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Department of Energy Federal Training Support Services

AGENCY TENDER

**VOLUME II
TECHNICAL PROPOSAL**

**DEPARTMENT OF ENERGY – FEDERAL TRAINING SUPPORT
SERVICES
AGENCY TENDER – VOLUME II**

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VOLUME II: TECHNICAL PROPOSAL

INTRODUCTION AND BACKGROUND

The Department of Energy's (DOE) Training Support Services Agency Tender (AT) is a complete, comprehensive, organized, and analytically based proposal for future operations. The Technical Approach and Human Resources Allocation Sections of this Proposal present these facts in detail and provide all the information required by the solicitation. The important elements of this Proposal are:

- The Agency's Most Efficient Organization (MEO) can meet or exceed all standards in the Performance Work Statement (PWS) for timeliness and quality and meet all PWS task requirements.
- The MEO intends to draw from a pool of experienced professionals with in-depth knowledge of the diverse training needs found at Headquarters and field locations.
- The MEO's management structure is set up with clear lines of authority, and provides MEO management with the ability to direct and supervise staff and address personnel issues at many sites, while serving a diverse group of customers.
- The MEO's organizational structure facilitates cross-utilization of personnel knowledge, skills, and abilities.

This AT reflects a combination of effective existing practices, elements of the current organizational structure, as well as shifts in training responsibilities, and modifications to the organizational structure designed to create efficiency and enhance customer service.

The modification of the organizational structure is the product of an in-depth study that relied on redesigning key business processes; these include:

- Geographic consolidation.
- Using defined work processes from successful field sites as the basis for the MEO's operations.
- Re-aligning job tasks related to training functions (facilitated by the geographic consolidation).
- Properly aligning grade structure with the activities contained specifically within the PWS.

The purpose of this AT is three-fold: first, to demonstrate that the MEO staffing and processes can thoroughly and completely fulfill all of the requirements of the PWS; second, to show how the MEO Team arrived at the MEO structure and staffing levels; and third, to show the additional value above and beyond the basic PWS requirements that this MEO can and will provide.

While developing the AT for this A-76 Competition, the MEO Team examined the organization to identify potential changes that would reduce work effort, improve the work processes and environment, and reduce cost. In doing so, a series of data collection techniques were used, each having its own purpose, and each designed to answer a different set of questions. The MEO Team embarked on a thorough and systematic study of each of the 33 Elements identified in PWS Appendix A as under study in the A-76 Competition.

Table 0-1: DOE Elements and Employees Supported by the Training Support Services Organization

No.	Location	DOE Elements (from PWS Appendix A)		No. of DOE Employees	Core Group	WOC	AOC	Liaison Site
1	Washington, DC	Office of Management, Budget, and Evaluation/CFO	ME	675	x	x		
2	Washington, DC	Office of the Chief Information Officer	IM	100	x	x		
3	Washington, DC	Office of Congressional and Intergovernmental Affairs	CI	42	x	x		
4	Washington, DC	Office of Economic Impact and Diversity	ED	38	x	x		
5	Washington, DC	Office of Energy Efficiency and Renewable Energy	EE	487	x	x		
6	Golden, CO	Golden Field Office		55	x		x	
7	Washington, DC	Energy Information Administration	EIA	379	x	x		
8	Washington, DC	Office of General Counsel	GC	148	x	x		
9	Washington, DC	Office of Hearings and Appeals	HG	39	x	x		
10	Washington, DC	Office of Independent Oversight and Performance Assurance	OA	61	x	x		
11	Washington, DC	Office of Policy and International Affairs	PI	103	x	x		
12	Washington, DC	Office of Public Affairs	PA	27	x	x		
13	Washington, DC	Office of Worker and Community Transition	WT	18	x	x		
14	Germantown, MD	Office of Security	SO	251	x	x		
15	Washington, DC	Under Secretary for Nuclear Security/Administrator for National Nuclear Security Administration (NNSA) Headquarters	NA	554	x	x		
16	Albuquerque, NM	NNSA Albuquerque	AL	1314	x		x	
17	Las Vegas, NV	NNSA NV	NV	276	x		x	
18	Oakland, CA	NNSA Oakland	LL	333	x		x	
19	Washington, DC	Assistant Secretary for Environment, Safety and Health	EH	246	x	x		
20	Washington, DC	Assistant Secretary for Environmental Management	EM	381	x	x		
21	Washington, DC	Assistant Secretary for Fossil Energy	FE	296	x	x		
22	Pittsburgh, PA	National Energy Technology Laboratory, Pittsburgh, PA.	NETL	561	x	x		
23	New Orleans, LA	Strategic Petroleum Reserve Project Office, New Orleans, LA	SPRO	98	x	x		
24	Washington, DC	Office of Science	SC	356	x	x		
25	Washington, DC	Office of Civilian Radioactive Waste Management	RW	163	x	x		
26	Washington, DC	Office of Nuclear Energy, Science, and Technology	NE	107	x	x		

No.	Location	DOE Elements (from PWS Appendix A)		No. of DOE Employees	Core Group	WOC	AOC	Liaison Site
27	Chicago, IL	Chicago	CH	405	x	x		x
	Upton, NY	Brookhaven Area Office						
28	Idaho Falls, ID	Idaho	ID	351	x		x	x
29	Oak Ridge, TN	Oak Ridge	ORO	464	x	x		x
30	Miamisburg, OH	Ohio	OHIO	183	x	x		
31	Golden, CO	Rocky Flats	RF	170	x		x	
32	Richland, WA	Richland	RL	472	x		x	x
33	Aiken, SC	Savannah River	SR	448	x	x		x
TOTAL EMPLOYEES SUPPORTED				9601		6630	2971	

Note: 'x' denotes the Division of the MEO providing service

THE APPROACHES TO REACH AN MEO

The MEO Team used multiple techniques to construct a thorough, accurate, and cost effective Proposal. Among the many approaches were:

- *Personnel interviews* — The MEO Team conducted interviews with managers, team leads, supervisors, and employees to identify potential areas of improvement for the Organization. The interviews provided an informal setting to allow for open and candid discussions. Multiple interviews were conducted with staff at many sites.
- *Examination of historical data* — The MEO Team reviewed historical records to gain greater insight into the current operation. PWS workload provided the basis for this analysis; however, additional analysis was required to acquire a more in-depth understanding of the MEO requirements.
- *Review of standard operating procedures, regulations, and publications* — The MEO Team reviewed standard operating procedures and other documents that dictate what or how work should be accomplished, and inquired as to whether any of the procedures are no longer applicable. The MEO Team used this information to revise processes and to identify efficiencies for the organization.
- *Process improvement discussions* — The MEO Team conducted several small group management plan discussions. The purpose of these discussions was to elicit and develop ideas that might improve the operations of the Training Support Services function. The discussions accomplished two important objectives: identifying improvements that might yield significant savings, and identifying how the proposed MEO for Training Support Services could compete effectively against potential contractors.

The data collection techniques utilized provided sufficient information to evaluate potential process improvements and provide a multidimensional and accurate picture of all training processes. These preliminary findings were subjected to additional fact-finding, in-depth analyses, statistical evaluation, and cross-functional comparisons. Personnel within DOE were contacted as needed to clarify issues and to enhance recommended improvements.

HIGHLIGHTS OF THE MEO PROPOSAL

The proposed MEO is comprised of a versatile, experienced, and well-trained workforce ready to meet the changing needs of DOE. Although the major Departmental programs have taken the first steps towards a transition to programmatic service centers, the concept of

cross program support will result in a *major culture change* in the Department. The MEO is designed to work proactively with all customers to complement this change.

As the incumbent, the MEO offers an organization and staff who are knowledgeable and experienced in the businesses of the Department, including its mission, the needs of the workforce, the needs of its leaders, key areas for enhancement, and workable solutions. The MEO Team believes that the corporate approach encourages best-in-class capabilities in a continuous learning environment by taking advantage of existing systems and programs, putting people where the work is, and enhancing customer care. The MEO Team believes there are several key advantages the proposed MEO has, which are outlined below.

- ***We are stakeholders in the MEO and we know DOE's missions and goals.*** The success of the MEO as a Service Provider is dependent on the success of the individual employees that will make up the MEO. This provides motivation for innovation and top-notch customer care.

DOE organizations are currently expected to prepare workforce plans to identify skill gaps, succession planning needs, expected recruitment and changing priorities. Our proposal marries the training needs assessment and planning with the existing workforce planning process to ensure organizational, occupational, and individual training needs are rolled into Departmental Training Plans, which drive budget decisions.

- ***We add strategic value because we know our customers' needs.*** As active participants in DOE's implementation of the Presidential Management Agenda, including Human Capital Management and e-Gov, we have focused our proposal on centralizing the Department's training support function to standardize processes; reduce duplication; maximize the capabilities of existing systems (e.g., Corporate Human Resource Information System (CHRIS)); and promote unification of the training and employee development portions of Human Capital Management implementation.
- ***We can provide innovative uses for existing information management tools.*** The best and full utilization of the CHRIS Suite of systems, including workflow, Employee Self Service (ESS) and DOE/Info is critical to improving customer care. We know that these systems are underutilized in the Department, often due to lack of a full appreciation for their capabilities. Our proposal includes an enhancement of an Information Manager to act as liaison between the training community and the CHRIS technical staff. This Information Manager will work with CHRIS technical staff to fully understand the capabilities available, to ensure customers and MEO employees get the support needed to fully implement the tools, to prioritize and document needed innovations to enhance customer service and satisfaction, and to ensure the most important improvements are recommended for implementation. The MEO has a long-term interest in product improvement, and this position will be active in that process.
- ***We can provide innovative, integrated service support capabilities.*** The inclusion of Government contracts as Government-furnished assets to be used by the Service Provider is an innovative approach. The ongoing administration of the contracts in PWS Appendix J is critical to ensuring an optimum level of service to the Department. The MEO can make use of a vehicle, for example, a memorandum of understanding (MOU) or a letter of delegation, to make effective use of these Government-furnished assets as identified. Working with the Contracting Officer's Representative (COR), we can have direct access to the available assistance, guidance, and support. The MEO Federal employees are currently working with existing support service contractors, which not only provides for a relationship with a distinct advantage, but does not alter the terms of the original contracts.

1 EVALUATION FACTOR ONE - HUMAN RESOURCES ALLOCATION

1.1 ORGANIZATION STRUCTURE AND STAFFING

Evaluation Factor One is an overview of how the Agency proposes to configure the MEO, manage its human resources, and allocate human resources to meet the requirements of the PWS. The following sections also provide the specifics of the organizational structure, management authorities and control, and how the MEO plans to interface among its own elements and the COR.

1.1.1 Human Resources Configuration

1.1.1.1 Concepts Leading to the MEO's Structure

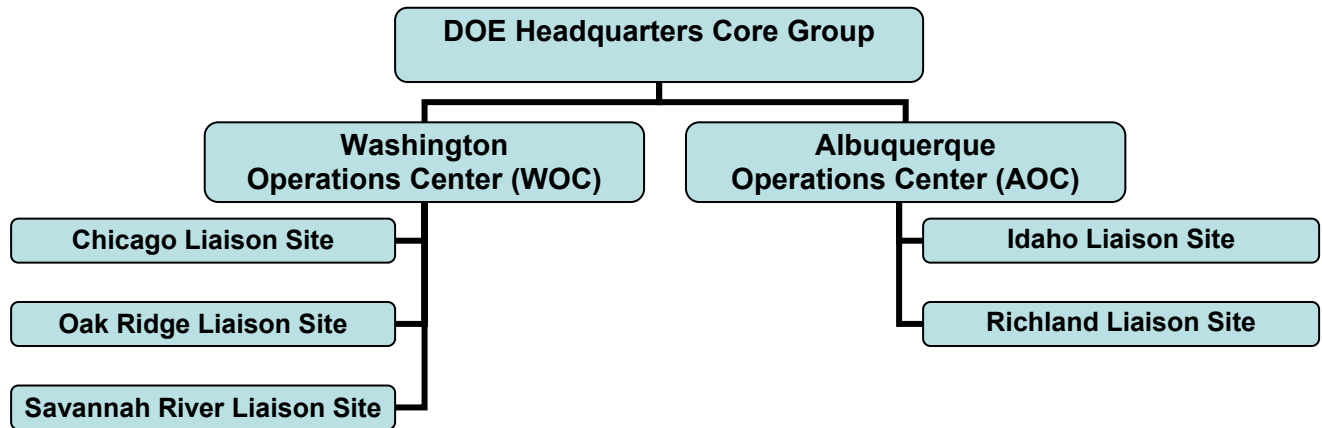
The MEO structure is primarily based on four concepts. First, consolidating training administration and customer support to designated locations to achieve economies of scale and better utilize staff time; second, meeting the requirement to staff a core group in Washington; third, locating significant staffing in those locations with high levels of customer interactions and courses; and fourth, adjusting staffing based on a careful examination of the Organization's current workload.

The proposed organizational structure permits greater accountability and clearer lines of authority for training support services, which is one of the many positive features of the MEO, and this AT offer. The structure aims to permit the development of a corporate approach, while keeping the genuinely local aspects, (i.e., the face-to-face and site-specific training issues) at the DOE sites under study. The structure also allows for flexibility to accommodate future organizational decisions.

A corporate approach is essential given DOE's objective to deliver the most beneficial training to the greatest number of staff in a timely manner. A corporate approach with corporate policy makers is the most efficient and organizationally consistent way to allocate training resources, despite multiple locations and attrition.

The following organization chart provides the framework of the organization.

Figure 1-1: Organizational Structure of the MEO



A more detailed organization chart with staffing is provided in AT Appendix B.

1.1.1.2 General Discussion of the MEO's Structures

The primary Divisions of the MEO include the DOE Headquarters Core Group (Core Group), two Operations Centers, and Liaison sites. The Core Group, as required by the Solicitation, will be located in Washington, DC. The two Operations Centers will be located in Albuquerque, NM and Washington, DC, and will serve as two centralized customer service locations. These locations were chosen for several reasons including the number of courses offered and conducted, the number of customers served, and their geographic locations. Due to the geographic location of customers and the requirement in the solicitation to provide services between the hours of 8:00 a.m. and 8:00 p.m. Eastern Standard Time, two locations were needed to avoid overtime or abnormal work shifts. Albuquerque is in the Mountain Time zone, which will necessitate customer service personnel to be available until 6:00 p.m. local time. The matrix in Table 0-1 shows the service locations for the 33 DOE Elements.

The Liaison sites will be located in Chicago, IL (Chicago); Idaho Falls, ID (Idaho); Oak Ridge, TN (Oak Ridge); Richland, WA (Richland); and Aiken, SC (Savannah River). The services provided by the Liaisons at their respective sites will also be provided to the other DOE Elements by the WOC and the AOC as shown in the crosswalk in Appendix C; for example, assisting DOE Elements with Needs Assessments, and providing general assistance and expertise on training issues. AT Appendix D shows the transition from unadjusted hours identified in the crosswalk to actual FTEs. AT Appendix E shows the primary PWS tasks by location and the PWS tasks by primary and secondary location.

The MEO will work with existing Contracts as described in PWS Section 6.9; however, the Agency Tender is not proposing the use of subcontracts in the performance of required tasks.

The Continuing Government Organization (CGO) (also called the Residual Organization (RO)) is vital to the success of the MEO. The CGO includes the remaining DOE Training Office Management and COR, with whom the MEO must work hand-in-hand. Section 1.3 provides further detail on the MEO's relationship to the CGO.

1.1.1.3 Headquarters Core Group

The Core Group will maintain authority and facilitate overall program management, policy interpretation, communications, reporting, and decision-making for the MEO. Creating

clear lines of authority and communication is an absolute necessity for the Core Group to maintain a well structured and efficient organization. Section 1.4 provides additional information on specific tasks of the Core Group personnel.

1.1.1.3.1 Management Authorities

The Project Manager will maintain ultimate authority in the MEO, and provide direct management and leadership over the actions and work of all the MEO Divisions and employees, including the Operations Center and Core Group. Core Group staff includes the Corporate Training Officer, Corporate Training Specialists, Quality Control Management Point of Contact (POC), Technical Qualification Program (TQP) Manager, and an Administrative Assistant. These positions will be responsible for managing their respective programs and coordinating MEO-wide activities. Specifically, the TQP Manager will provide consultative services to the TQP agents in the field based on policies established by the Federal Technical Capability Panel (FTCP).

1.1.1.3.2 Decision and Control Authorities

The Core Group will comprise the primary decision makers at the corporate, MEO-wide level. How to apply policy and organizational directives will be decided upon and approved at this level. While all locations are self-sufficient and capable of managing at their respective levels, the need for continuity of services and products necessitates major decisions to be made at the Core Group level.

The Project Manager will have the final decision and control authority for the Organization. The Core Group and senior staff at the Operations Centers will keep the Project Manager apprised of any decisions that need to be made or issues that need addressing.

1.1.1.3.3 Business Interface Relationship with CGO

The Project Manager will interface directly with the CGO, including the COR, to help maintain the continuity of operations and to define goals. Routine communication with the CGO regarding the status of the MEO, potential changes, and work accomplishment will be critical to the MEO's success. Likewise, communication with external customers conducting business with the MEO will be crucial to assure a smooth transition to the MEO and achievement of anticipated efficiencies. The Core Group will be responsible for ensuring all groups and Elements interacting with the MEO and acquiring services or products from the MEO are properly informed of procedures and requirements.

The Core Group will receive directions and suggestions from the CGO as needed to meet the training support service needs of DOE.

1.1.1.4 Washington Operations Center (WOC)

The WOC will provide the primary functions of training support services including course registration, customer service, and problem resolution, which are major elements found in PWS Section 3.2. Human Resources Specialists will also play a role in developing policy recommendations, Individual Development Plans (IDP), and the needs assessments and Training Plans for specific Elements. In addition, the WOC will be under the leadership and supervision of the Deputy Project Manager.

The WOC will provide customer service, course evaluations, Needs Assessments, and other support activities for the Office of Management, Budget, and Evaluation (ME), Office of the Chief Information Officer (IM), Office of Congressional and Intergovernmental Affairs (CI), Office of Economic Impact and Diversity (ED), Office of Energy Efficiency and Renewable Energy (EE), Energy Information Administration (EIA), Office of General

Counsel (GC), Office of Hearings and Appeals (HG), Office of Independent Oversight and Performance Assurance (OA), Office of Policy and International Affairs (PI), Office of Public Affairs (PA), Office of Worker and Community Transition (WT), Office of Security (SO), Under Secretary for Nuclear Security/Administrator for National Nuclear Security Administration (NNSA) Headquarters (NA), Assistant Secretary for Environment, Safety, and Health (EH), Assistant Secretary for Environmental Management (EM), Assistant Secretary for Fossil Energy (FE), National Energy Technology Laboratory (NETL), Strategic Petroleum Reserve Office (SPRO), Office of Science (SC), Office of Civilian Radioactive Waste Management (RW), Nuclear Energy, Science, and Technology (NE), Chicago (CH) including the Brookhaven Area Office, Ohio (OH), Oak Ridge Office (ORO), and Savannah River (SR). Table 0-1 provides detailed location and service information.

The Human Resources Specialists (Liaison) for Chicago, Oak Ridge, and Savannah River, will report directly to the WOC, specifically to the Deputy Project Manager.

Table 0-1 and Appendices A, D, and H provide additional detail on locations where tasks will be performed, responsibilities, and workload.

1.1.1.4.1 Management Authorities

The Deputy Project Manager will be the primary management authority for the WOC. However, the Deputy Project Manager will be assisted by Human Resources Specialists (Team Lead) for direct management of staff, who will be primarily focusing on customer service and course evaluations.

1.1.1.4.2 Decision and Control Authorities

Decision and control authorities will follow the same lines as management authorities. The primary WOC decisions will be handled by the Deputy Project Manager, with higher level and potentially policy-related decisions referred to the Core Group. The Team Lead will have operational responsibility and management of day to day decisions and workflow, which includes providing assignments to staff and managing workload.

1.1.1.4.3 Business Interface Relationship with the Core Group and CGO

The staff at the WOC will interface with the Core Group and CGO through the Deputy Project Manager as needed. The Deputy Project Manager will interact with the Core Group to keep them apprised of the activities, workload, concerns, and suggestions at the WOC. With the geographic location of the WOC and Core Group being the same, it is anticipated the level of interaction between these two groups will be on a routine basis.

1.1.1.5 Albuquerque Operations Center (AOC)

The AOC will perform the same activities as the WOC, but will be located in Albuquerque to better serve the more western locations of DOE and training support services customers. The locations for which AOC will perform customer service activities include NNSA-Albuquerque (AL), NNSA-Nevada (NV), NNSA-Oakland (LL), Idaho (ID), Rocky Flats (RF), Richland (RL), and the Golden Field Office. The matrix in Table 0-1 provides detailed location and service information.

The Liaisons for Idaho and Richland will report directly to the AOC, specifically to the Deputy Project Manager.

Table 0-1 and Appendices A, D, and H provide additional detail on locations where tasks will be performed, responsibilities, and workload.

1.1.1.5.1 Management Authorities

The management authorities will generally be the same as listed above for the WOC. The AOC will follow the management philosophies and practices determined by the Core Group.

1.1.1.5.2 Decision and Control Authorities

The decision and control authorities will also be generally the same as listed above for the WOC.

1.1.1.5.3 Business Interface Relationship with Core Group and CGO

Again, the business interface relationships with the Core Group and CGO will be similar to those listed above for the WOC.

The two Operations Centers will coordinate their operations through their respective Deputy Project Managers to ensure all areas and activities are covered consistently. The Core Group will serve as a facilitator to encourage this communication and sharing.

1.1.1.6 Liaison Sites

The MEO proposes Liaison Sites (Chicago, Idaho, Oak Ridge, Richland, and Savannah River) to represent areas where significant training activities occur, but do not have the same level of workload as an Operation Center. Placing staff at these sites will foster human interaction with the MEO, and help to facilitate training activities. The GS-201-12 Human Resources Specialists (Liaison) at these sites will serve as points of contact for training issues, and provide assistance and expertise for larger training support activities such as needs assessment. The Liaisons will provide support for course evaluation when necessary. The Liaisons will also provide subject matter expertise with M&O and M&I training-related issues, and facilitate and educate on career development program activities.

It is important to note that Liaisons will be paired with Human Resources Specialists at their respective Operations Centers to provide customer back-up and create continuity of services, as well as to share site specific knowledge in the event of staff turnover.

1.1.1.6.1 Management Authorities

The Liaison Sites are assigned to report directly to one of the two Operations Centers as mentioned above. Chicago, Oak Ridge, and Savannah River will report to the WOC; Idaho and Richland will report to the AOC. The Liaisons will be responsible for self management, but will also be accountable to the respective Operations Center.

1.1.1.6.2 Decision and Control Authorities

Decision and control authorities will primarily be handled by the Operations Center. However, Liaisons will have the ability and knowledge to make day to day decisions and accomplish required work.

1.1.1.6.3 Business Interface Relationship with Core Group and CGO

Concerns, issues, and general information to be shared with the Core Group or CGO will be handled through the Liaisons' respective Operations Centers. However, because of their proximity to CGO staff at the sites, it is anticipated that interaction on such matters as procurement, available funds, and site priorities will be common.

1.1.2 Rationale for the Structure and Staffing of the MEO

The structure of the MEO was based on several factors that are listed below. These factors resulted in keeping a number of important activities at the field office level, while others

were shifted for the sake of efficiency, customer service, and to gain a concentration of expertise at a particular location.

- *Proximity to the Customer* – To perform certain tasks effectively and efficiently, proximity to the customer is an important element. For instance, face-to-face meetings with division and section chiefs and directors to determine an organization's training needs for the year might fall into this category. While the activity could be performed remotely, and is in the many cases, face-to-face is beneficial. For instance, putting a face to training at locations with a significant number of training instances and sites with specific programs is important simply to maintain an ongoing dialogue on training needs and required adjustments.
- *Activities Already Performed Effectively Remotely* – Since DOE staff is dispersed throughout many locations and many offices provide the overwhelming majority of their services remotely already, the MEO Team analyzed current methods of delivery of services. The MEO Team found that many of the primary activities are performed remotely in an effective and efficient manner. For example, registration, course announcement, customer follow-up, and course searching for five different locations are handled remotely in Albuquerque by only a few staff. Needs Assessment is another essential element of the training continuum that is performed primarily remotely, via phone, teleconference, and e-mail.
- *Retention of Qualified Staff* – The MEO structure is designed to make it possible to retain experienced staff where possible. By not shifting all operations from the field office level to a single centralized location, the chances of retaining experienced staff is significantly greater than if all activities were concentrated in Albuquerque or Washington, DC. The cadre of experienced training professionals is one of the greatest strengths and most unique assets of the MEO. The MEO structure is designed to make it possible to retain experienced staff where possible. The MEO team also expects that keeping positions in the MEO at Chicago, Idaho, Oak Ridge, Richland, and Savannah River will provide opportunities to retain some of our most experienced staff.
- *Continuity of Operations* – Leaving targeted activities at the field office level is an intentional decision to ensure continuity of operations and foster the interactions between MEO staff and DOE staff outside of this A-76 Study. The MEO team realizes that significant customer education is required as the MEO is implemented and new approaches, personal relationships, and customer roles are introduced. Having a physical presence to guide many of the DOE sites through this series of changes will serve the CGO, the customers, and the MEO well. By leaving experienced staff at the field level, particularly in a period of transition, the MEO aims to keep knowledgeable staff at critical points in the overall training infrastructure of the department.

The majority of staffing changes incorporated into the MEO occur at the field office locations, notwithstanding the decisions to retain certain tasks at field office locations.

1.2 HUMAN RESOURCES ALLOCATION MATRIX

The MEO can successfully perform the work in the PWS with a total of 61 FTEs. The overall decrease in staffing and grade levels, relative to the current organization, is attributable to efficiencies gained through organizational realignment and economies of scale realized through centralization of workload. A task by task analysis of the workload also revealed where the current staffing exceeded the need for staff specifically performing PWS activities. Moreover, the MEO's compressed organizational structure will facilitate the more effective utilization of management and resources (e.g., less non-productive time). The following table

shows a summary of the human resources needed to staff the MEO. Detailed matrices of staffing by PWS Functional Area and other human resources are provided separately in AT Appendix F. Appendix F also shows from where abandoned sites will receive support.

Table 1-1: MEO Staffing By Grade and Organizational Structure (Summary)*

Labor Category	Grade-Series	Skills to be Employed	Number of Full-Time Personnel for the Effort	Location of Effort
DOE Headquarters Core Group				
Project Manager (Supervisory Human Resources Specialist)	GS-201-14	PWS 4.1.2	1.0	Washington, DC
Quality Control Management Point of Contact (Human Resources Specialist)	GS-201-13	PWS 4.1.3	1.0	Washington, DC
Corporate Training Officer (Human Resources Specialist)	GS-201-13	PWS 4.1.4.1	1.0	Washington, DC
Corporate Training Specialist (Human Resources Specialist)	GS-201-12	PWS 4.1.4.2	3.0	Washington, DC
Technical Qualifications Program Manager (Human Resources Specialist)	GS-201-13	PWS 4.1.4.3	1.0	Washington, DC
Administrative Assistant (Human Resources Assistant)	GS-203-07	PWS 5.10 and Indirect Support	1.0	Washington, DC
Washington Operations Center (WOC)				
Deputy Project Manager (Supervisory Human Resources Specialist)	GS-201-13	Supervision and Indirect Support	1.0	Washington, DC
Human Resources Specialist	GS-201-12	PWS 2.1.1-2.1.2, 2.1.5, 2.1.7, 3.1.3, 3.2.17, 3.2.20, 3.4.1-3.4.2, 3.5.1-3.5.3	3.0	Washington, DC
Human Resources Specialist (Information Specialist)	GS-201-12	Multiple	1.0	Washington, DC
Human Resources Specialist (TQP)	GS-201-12	PWS 3.5.1, 3.6.1-3.6.2	1.0	Washington, DC
Human Resources Specialist	GS-201-11	PWS 3.1.1, 3.2.11, 3.2.16-3.2.17, 3.2.19-3.2.20	3.0	Washington, DC
Human Resources Specialist (Team Lead)	GS-201-09/11	PWS 3.3.9-3.3.10, 3.3.17, Supervision	1.0	Washington, DC
Human Resources Specialist	GS-201-09/11	PWS 3.2.1-3.2.14, 3.3.9, 3.3.17-3.3.18	4.0	Washington, DC
Human Resources Assistant	GS-203-07	PWS 3.3.1-3.3.6, 3.3.8, 3.3.10-3.3.14, 3.3.18, 3.6.3	10.0	Washington, DC
General Clerk (Human Resources Assistant)	GS-203-05	PWS 3.3.15 and Indirect Support	1.0	Washington, DC
Albuquerque Operations Center (AOC)				

Labor Category	Grade-Series	Skills to be Employed	Number of Full-Time Personnel for the Effort	Location of Effort
Deputy Project Manager (Supervisory Human Resources Specialist)	GS-201-13	Supervision and Indirect Support	1.0	Albuquerque, NM
Human Resources Specialist	GS-201-12	PWS 2.1.1-2.1.2, 2.1.5, 2.1.7, 3.1.3, 3.2.17, 3.2.20, 3.4.1-3.4.2, 3.5.1-3.5.3	1.0	Albuquerque, NM
Human Resources Specialist (Information Specialist)	GS-201-12	Multiple	1.0	Albuquerque, NM
Human Resources Specialist (TQP)	GS-201-12	PWS 3.5.1, 3.6.1-3.6.2	1.0	Albuquerque, NM
Human Resources Specialist	GS-201-11	PWS 3.1.1, 3.2.11, 3.2.16-3.2.17, 3.2.19-3.2.20	2.0	Albuquerque, NM
Human Resources Specialist (Team Lead)	GS-201-09/11	PWS 3.3.9-3.3.10, 3.3.17, Supervision	1.0	Albuquerque, NM
Human Resources Specialist	GS-201-09/11	PWS 3.2.1-3.2.14, 3.3.9, 3.3.17-3.3.18	3.0	Albuquerque, NM
Human Resources Assistant	GS-203-07	PWS 3.3.1-3.3.6, 3.3.8, 3.3.10-3.3.14, 3.3.18, 3.6.3	12.0	Albuquerque, NM
General Clerk (Human Resources Assistant)	GS-203-05	PWS 3.3.15 and Indirect Support	1.0	Albuquerque, NM
Chicago Liaison Site				
Human Resources Specialist (Liaison)	GS-201-12	PWS 2.1.1, 2.1.7, 3.1.1, 3.2.1, 3.4.1-3.4.2, 3.5.1-3.5.3	1.0	Chicago, IL
Idaho Liaison Site				
Human Resources Specialist (Liaison)	GS-201-12	PWS 2.1.1, 2.1.7, 3.1.1, 3.2.1, 3.4.1-3.4.2, 3.5.1-3.5.3	1.0	Idaho Falls, ID
Oak Ridge Liaison Site				
Human Resources Specialist (Liaison)	GS-201-12	PWS 2.1.1, 2.1.7, 3.1.1, 3.2.1, 3.4.1-3.4.2, 3.5.1-3.5.3	1.0	Oak Ridge, TN
Richland Liaison Site				
Human Resources Specialist (Liaison)	GS-201-12	PWS 2.1.1, 2.1.7, 3.1.1, 3.2.1, 3.4.1-3.4.2, 3.5.1-3.5.3	1.0	Richland, WA
Savannah River Liaison Site				
Human Resources Specialist (Liaison)	GS-201-12	PWS 2.1.1, 2.1.7, 3.1.1, 3.2.1, 3.4.1-3.4.2, 3.5.1-3.5.3	1.0	Aiken, SC
TOTAL			61.00	

*Note: The columns titled "Number of Full Time Personnel to be Hired" and "Average Years of Subject Matter Experience" were excluded as they do not apply to the Agency Tender.

As shown in the table above, the largest contingent of staff will be in the Washington, DC area (Core Group and WOC). The Core Group will include a GS-14 Project Manager (Supervisory Human Resources Specialist), a GS-13 Quality Control Management POC (Human Resources Specialist), a GS-13 Corporate Training Officer (Human Resources Specialist), GS-12 Corporate Training Specialists (Human Resources Specialist), a GS-13 Technical Qualifications Program Manager (Human Resources Specialist), and a GS-07 Administrative Assistant (Human Resources Assistant).

The WOC staffing will include a GS-13 Deputy Project Manager (Supervisory Human Resources Specialist), GS-12 Human Resources Specialists, a GS-12 Human Resources Specialist (TQP), a GS-12 Human Resources Specialist (Information Specialist), GS-11 Human Resources Specialists, a GS-09/11 Human Resources Specialists (Team Lead), GS-09/11 Human Resources Specialists, GS-07 Human Resources Assistants, and a GS-05 General Clerk.

The AOC also has a large contingent of MEO staff, primarily due to the number of customers in Albuquerque and the volume of training courses and instances. The continuing consolidation of NNSA-Nevada field office, NNSA-Oakland field office, and NNSA-Headquarters training responsibilities in Albuquerque makes this location a logical and functional choice as another Operations Center.

The AOC staff will include a GS-13 Deputy Project Manager (Supervisory Human Resources Specialist), a GS-12 Human Resources Specialist, a GS-12 Human Resources Specialist (Information Specialist), a GS-12 Human Resources Specialist (TQP), GS-11 Human Resources Specialists, a GS-09/11 Human Resources Specialist (Team Lead), GS-09/11 Human Resources Specialists, GS-07 Human Resources Assistants, and a GS-05 General Clerk.

As shown in the table above, five sites will each have a Human Resources Specialist (Liaison), a new multi-skilled and multi-purpose position designed to link formerly full service sites with the new organizational structure.

1.3 RELATIONSHIP TO CONTINUING GOVERNMENT OPERATIONS (CGO)

The MEO is structured to support the overall mission of the DOE Training Support Services to DOE, and is designed to promote a versatile and well-trained Federal workforce that meets the changing needs of the Department. By definition, this means MEO staff will need to interact and communicate with the larger Training Support Services community. The MEO Team is aware of, and has planned, the points where the MEO staff will interact with the COR and the CGO. The following areas stand out as key areas of interaction.

- *Training Budget:* MEO staff will interact with CGO staff responsible for monitoring the expenditures of the training elements. The MEO envisions that the Human Resources Specialists (Liaison) will serve as the primary contacts for budget issues. The MEO Team recognizes that MEO staff will not have authority over the budgets of the DOE Elements and sub-Elements it supports.
- *Procurement:* As required by policy, the ability to commit Government resources remains an Inherently Governmental activity and will not be an MEO responsibility. However, the MEO staff will have interaction with the CGO on procurement. The Human Resources Specialists will supply market analyses and other relevant information as required in the PWS, and provide recommendations. The CGO will then make the decision as to which vendor to use and will procure the services. The MEO staff will also coordinate with the CGO to communicate details with customers.

A similar effort of coordination and recommendations will occur when drafting work statements and other solicitation documentation and support.

- *Policy:* The CGO retains control over determination of training policy; this is an Inherently Governmental activity. As the PWS states, the MEO staff, particularly the key personnel in the Core Group, will interact with like senior staff in the CGO on policy issues. The subject matter expertise, not to mention the overall experience, of these staff members will be an asset that will be continually tapped. The Core positions are designed to be consultative and advisory in nature and are expected to be used by senior CGO personnel.
- *Subject Matter and Technology Experts:* The MEO will maintain relationships with representatives in the Information Management Systems (e.g., CHRIS) area. Specifically, the MEO will communicate with CHRIS technical experts in regard to training support service issues. Additionally, whenever requested or warranted, the MEO will interact with the CGO and subject matter experts for career and occupational programs.
- *Career Development Programs:* The Human Resources Specialists at the AOC and WOC and the Human Resources Specialists (Liaison) will interact with CGO staff located at the DOE Elements and in Headquarters for issues, updates, and modifications to the Career Development Programs. The Specialists and Liaisons will work with the CGO in various offices to ensure program continuity and success. These interactions will be required to understand changing CGO and COR priorities, finances, and enrollment trends.

The MEO will implement a communication plan that is multifaceted, utilizes existing technology, and tailors information to target audiences, while recognizing the diversity of their information needs. The three fundamental tools that will be used for communication by the MEO include DOECASTS, a Training Support Services web page, and routine and continual briefings to the CGO and other DOE Senior Management.

When interacting and working with the CGO, the MEO will be in complete compliance with Circular A-76 regulations. The MEO is a distinct organization from the CGO (including the COR), and the workload and requirements in the PWS will only be performed by designated MEO staff. The tasks and work performed by the MEO are separate from the tasks performed by the CGO and the COR.

1.4 PERSONNEL REQUIREMENTS

The technical and management personnel described below are essential to the MEO's successful performance. A summary is provided below for each position considered to be key personnel, to including the Core Group and other significant MEO personnel. In lieu of resumes, Position Descriptions (PD) are attached in Attachment 1. These approved PD provide more detail than the summaries listed below. The positions will be filled in accordance with Office of Personnel Management (OPM) regulations.

1.4.1 Summary of Key and Core Group Personnel

The key personnel for the MEO are experienced, trained, knowledgeable, and flexible. Incumbents of these positions will be responsible for oversight and the accomplishment of all aspects of the MEO mission. These key positions were developed in response to the requirements of the solicitation and the needs of the MEO. The MEO considers the following as key positions:

- Project Manager (PM) (and Designated Alternates)
- Quality Control Management Point of Contact (POC)
- Corporate Training Officer
- Corporate Training Specialist
- Technical Qualification Program (TQP) Manager

The proposed management structure, relationship to CGO, decision processes, and overall management of resources for this Group are discussed in detail in Section 1.1.1 ; however, the following explains some of the responsibilities of these positions.

1.4.1.1 Project Manager

The PM will ensure the MEO's strategic plan, mission, vision, and values are communicated to employees; articulate and communicate to key personnel both routine assignments, special projects, and task timelines; coach key personnel in the selection and application of appropriate problem-solving techniques; lead the MEO in identifying, distributing, and balancing workload and tasks among key personnel; and monitor and report on the status and progress of work.

The PM will maintain program and administrative reference materials, project files, and relevant background documents; maintain current knowledge of procedures, policies, and directives; implement new policy and operational changes; prepare reports and maintain records of work accomplishments and administrative information; and lead the MEO in researching, learning, and applying a range of qualitative and quantitative methods to identify, assess, analyze, and improve the MEO's effectiveness, efficiency, and work products.

The PM will also oversee the MEO's operating procedures, ensuring the MEO meets the performance standards in the solicitation, and will act as liaison to the CGO. The Deputy Project Managers at the WOC and AOC will serve as the designated alternates to the PM, filling in when the PM is unavailable and accommodating the needs of remote sites.

1.4.1.2 Quality Control Management Point of Contact

The Quality Control Management POC will play a pivotal role in operations throughout the MEO, providing critiques, diagnoses, and corrections when process and data issues arise. The Quality Control Management POC will be responsible for ensuring all services provided by the MEO meet or exceed the performance standards specified in the PWS; will work with the PM to ensure the delivery of quality services by all positions within the organization; will be responsible for the execution of the Quality Control Plan, to include developing and refining performance metrics; and will be ultimately responsible for all quality control reporting for the organization.

1.4.1.3 Corporate Training Officer

The Corporate Training Officer (CTO) will be responsible for managing the DOE corporate training program as a high quality, cost-effective, centralized training program for DOE employees; translating and implementing goals, policies, systems, and procedures into the corporate training programs; ensuring training is linked to business needs (e.g., Needs Assessments); and coordinating support for administering and managing career and employee development programs at Headquarters.

The CTO will review DOE training and certification and assure that programs are designed and developed to satisfy DOE requirements and programmatic needs.

The CTO will advise and make recommendations to the CGO on policy, regulations, laws, procedures, and good business practices; on improvements to existing programs; on planning, development, and resource management for new career programs; and on design and delivery of training. The CTO will also assist with interagency liaison activities and provides input and recommendations for interagency agreements.

1.4.1.4 Corporate Training Specialists

The Corporate Training Specialists will have primary responsibility for various training activities such as the DOE Annual Training Plan, needs assessments, training evaluation, and web-based training systems. The Corporate Training Specialists will have knowledge of curriculum development, training resources, policies, and procedures, delivery methods, and evaluation methodology.

The Corporate Training Specialists will incorporate the Annual Training Plans from each DOE Element into the consolidated DOE Annual Training Plan; ensure implementation of the Annual Training Plan and track progress made on accomplishing annual strategic training objectives; and coordinate and evaluate needs assessments designed to meet DOE-wide training program objectives, including functional and occupational needs assessments.

The Corporate Training Specialists will provide guidance and assistance on course evaluations and training evaluation methodology, to ensure implementation of effective training programs, employee application of skills and knowledge on the job, and provision of return on investment for strategic planning.

The Corporate Training Specialists will support the web-based training system and provide overall management of the subscriptions and applications for access. The Corporate Training Specialists will also assess the benefits of web-based training systems and evaluate their ability to meet training goals and objectives.

1.4.1.5 Technical Qualification Program Manager

The Technical Qualification Program (TQP) Manager will provide input to the FTCP and CGO on issues related to maintenance and improvement of DOE defense nuclear facilities technical capability. This position will implement administrative factors and processes based on a working knowledge of Defense Nuclear Facility Safety Board (DNFSB) recommendations for technical training and FTCP guidance.

This position will serve as an advisor to the FTCP and CGO on aspects of the Career Intern Program, Senior Technical Safety Manager Program, Facility Representative Program, General Technical Base qualification standards, and the 28 functional area qualification standards. The TQP Manager will conduct periodic assessments of sufficiency and provide recommendations for new or updated standards. This position will also research and coordinate corrective action plans for DNFSB and FTCP training-related recommendations and requirements.

The TQP Manager maintains and manages official records related to program membership, standards and competency level requirements, qualification records, and testing results, and will prepare and submit quarterly reports on qualification status.

1.4.2 Other Essential Personnel

The MEO has two additional positions that are vital to the operation and success of the Organization. The MEO considers the following essential positions:

- Deputy Project Manager – WOC
- Deputy Project Manager – AOC

Below is a description of the roles and responsibilities of these positions.

1.4.2.1 Deputy Project Managers

The Deputy Project Managers will be in charge of the day-to-day operations of the WOC and AOC. Each will be responsible for personnel oversight and actions, broad work assignments, and overall Operation Center management, in coordination with the Team Leads at their respective locations.

The Deputy Project Managers will also have quality control responsibilities and serve as SME as needed for training related issues. These experienced Deputy Project Managers will also serve as points of contact for external organizations whose customers rely upon the support services of the MEO. In addition, the Deputy Project Managers will be the designated alternates to the PM.

1.4.3 Percentage of Supervisory/Lead Technical Personnel

The table delineates the planned supervisory and lead personnel time for the MEO.

Table 1-2: Percent of Supervisory/Lead Time

Position	Location	Percentage of Supervisory Time
Project Manager	Core Group	95%
Deputy Project Manager	WOC	97%
Deputy Project Manager	AOC	97%
Human Resources Specialist (Team Lead)	WOC	87%
Human Resources Specialist (Team Lead)	AOC	90%

1.4.4 Staffing By Location

The following tables show the MEO staffing by location; an organizational chart is provided in AT Appendix B.

1.4.4.1 Core Group Staffing

Table 1-3: Core Group Staffing

Position Title	Series	Grade	Number of FTE
Project Manager	GS-201	14	1.0
TQP Manager	GS-201	13	1.0
Quality Control Management POC	GS-201	13	1.0
Corporate Training Officer	GS-201	13	1.0
Corporate Training Specialist	GS-201	12	3.0

Position Title	Series	Grade	Number of FTE
Administrative Assistant	GS-203	07	1.0
TOTAL			8.0

1.4.4.2 WOC Staffing

Table 1-4: WOC Staffing

Position Title	Series	Grade	Number of FTE
Deputy Project Manager	GS-201	13	1.0
Human Resources Specialist	GS-201	12	3.0
Human Resources Specialist (TQP)	GS-201	12	1.0
Human Resources Specialist (Information Spec.)	GS-201	12	1.0
Human Resources Specialist	GS-201	11	3.0
Human Resources Specialist (Team Lead)	GS-201	09/11	1.0
Human Resources Specialist	GS-201	09/11	4.0
Human Resources Assistant	GS-203	07	10.0
General Clerk	GS-203	05	1.0
TOTAL			25.0

1.4.4.3 AOC Staffing

Table 1-5: AOC Staffing

Position Title	Series	Grade	Number of FTE
Deputy Project Manager	GS-201	13	1.0
Human Resources Specialist	GS-201	12	1.0
Human Resources Specialist (TQP)	GS-201	12	1.0
Human Resources Specialist (Information Spec.)	GS-201	12	1.0
Human Resources Specialist	GS-201	11	2.0
Human Resources Specialist (Team Lead)	GS-201	09/11	1.0
Human Resources Specialist	GS-201	09/11	3.0
Human Resources Assistant	GS-203	07	12.0
General Clerk	GS-203	05	1.0
TOTAL			23.0

1.4.4.4 Liaison Site Staffing

Table 1-6: Liaison Site Staffing

Position Title	Series	Grade	Location	Number of FTE
Human Resources Specialist (Liaison)	GS-201	12	Chicago	1.0
Human Resources Specialist (Liaison)	GS-201	12	Idaho	1.0
Human Resources Specialist (Liaison)	GS-201	12	Oak Ridge	1.0
Human Resources Specialist (Liaison)	GS-201	12	Richland	1.0

Position Title	Series	Grade	Location	Number of FTE
Human Resources Specialist (Liaison)	GS-201	12	Savannah River	1.0
TOTAL				5.0

1.4.5 Staffing the MEO

As an entity within the Federal Government, the MEO is subject to OPM and DOE Personnel policies, which dictate how the MEO is permitted to hire and assign personnel. The MEO will actively and consciously encourage advancement and reflect an appropriate diversity and skill mix in personnel. The MEO grade structure includes a natural progression of grades to encourage skilled staff to remain.

The MEO staff will utilize existing and provided DOE facilities and equipment at the locations identified in accordance with PWS Section 6.0.

1.4.5.1 MEO Compensation and Benefits

The MEO must, and intends to, comply with all OPM and DOE Human Resources policies. The MEO will continue to take full advantage of employee work/life benefits and flexibilities currently available to DOE employees (e.g., flex-time and alternative work schedules).

As mentioned above, the grade structure of the MEO encourages skilled staff to remain with the organization. Many, though certainly not all, of the positions contain a natural progression of grades stretching from GS-07 through GS-14.

1.4.5.2 Hiring, Turnover and Personnel Changes

When a position becomes vacant, DOE Training Support Services personnel protocol and procedures and OPM's Merit Systems principles will be used to fill the position. The job will be posted, a search will ensue, qualified candidates will be interviewed, and the best-qualified applicant will fill the vacancy.

The MEO Team believes the ability to take on new responsibilities, increase knowledge, and interact with new customers will actually present personal challenges to staff, and entice them to be part of the MEO organization.

The MEO will also adhere to all of DOE's policies and goals in regard to maintaining and encouraging a diverse workforce. The current pool of employees the MEO will draw upon is already diverse. The MEO, as a Government entity, will abide by all OPM and DOE Strategic Human Capital initiatives, directives, and programs to promote further diversity.

1.4.5.3 Training Philosophy and Approach

- 2 To be a resource in training takes training; that is the MEO's training philosophy for its own staff. Time for training will be available for all staff, particularly those who will need new skills or to build upon an already existing strong base of training and human resources skills. Management will identify any deficiencies in staff performance or cross-training needs, and ensure appropriate training is received both during the Phase-In and throughout the term of the Letter of Obligation. The training schedule will be determined after the number of new staff is determined, and the respective skills of both current and new staff are evaluated.

2.1.1.1 Diverse Workforce

The existing pool of employees that the MEO will draw upon is exceptionally diverse. As a Government entity, the MEO will abide by all OPM and DOE Strategic Human Capital initiatives, directives, and programs to encourage and maintain this diversity.

2.2 ANALYSES AND BACKGROUND INFORMATION USED TO DEVELOP THE MEO

2.2.1 Workload

The primary basis for staffing the MEO are the types and volume of each of the activities listed in the PWS. The MEO provides an adequate number of staff to meet the workload contained in the PWS and its appendices. The PWS contained workload that the MEO Team is obligated to use as the starting point for staffing. However, numerous sections of the PWS did not contain specific workload, and invited the bidder to make assumptions on the volume of activity associated with that particular PWS section. The MEO Team undertook a detailed review of these specific workload elements, and gathered time estimates for these tasks. The following sections explain the approach and methodology used to analyze the workload.

The workload for training support services is driven by several factors including the following:

- The number of Federal employees at a location.
- The number of Federal employees requiring certification, re-certification, or qualification.
- New proficiency requirements generated from Headquarters, Congress, the General Accounting Office (GAO), and other entities. Proficiency requirements impact the number and design of certification programs.
- The number of non-DOE employees, if any, supported by the Training Support Services function.
- DOE Element Budgets (i.e., if budget are limited, workload would decrease with needs prioritized and fewer registrations).

2.2.1.1 The Use and Analysis of PWS Appendix A

PWS Appendix A provided all of the locations where the MEO staff was required to perform specific tasks within the PWS. Below is a list of all of the support services (with a short description) that apply to these 33 DOE Elements. Hours have been included in the MEO to fully support these activities.

- PWS Section 2.1.1 (Liaison): Serve as a liaison to all of the locations listed in the PWS Appendix A.
- PWS Section 2.1.2 (Policy Recommendations): Provide recommendations on development, coordination, and evaluation for all DOE Elements.
- PWS Section 2.1.4 (Interagency Agreements): Serve as an interagency liaison and recommend interagency agreements.
- PWS Section 2.1.5 (Multi-element DOE Training): Ensure DOE training meets the multi-element requirements in DOE Order 360.1-1N and other requirements.
- PWS Section 2.1.6 (Annual Training Plan): Ensure a consolidated plan is provided to the COR, which requires close coordination with all DOE Elements.

- PWS Section 2.1.7 (Annual Training Plan): Support in the development and preparation of their Annual Training Plans in accordance with DOE Manual 360.1-1B.
- PWS Section 3.1 (Needs Assessment): Provide support, consultation, and coordination with all Elements in developing the Needs Assessments.
- PWS Section 3.4 (Subject Matter Expertise): Provide consultation and recommendations.
- PWS Section 3.5 (Employee Development Programs): Provide administration, consultation, and participant management.
- PWS Section 3.6 (Technical Qualification Program Support): Provide administration, consultation, and participant management.
- PWS Section 5.1 (Quality Control Plan): Develop and maintain a QC Plan that relates to the tasks provided to all customers and DOE Elements.
- Other PWS sections relating to directives or informational items and applying to all locations.

2.2.1.2 The Use and Analysis of PWS Appendix B

The MEO Team primarily used the data in PWS Appendix B, which is an extensive list of courses attended and instances of training, by location and DOE Element. This data related closely to the volume, location, and type of activities that the MEO staffed for to meet the requirements in PWS Sections 3.2 and 3.3. The PWS Appendix B identified the sites requiring these specific training support services.

The MEO Team developed its own analysis of the course workload, which resulted in a deeper understanding of the training staffing needs of the MEO. The MEO Team analyzed the data in great detail, and at many sub-levels, to determine its true and complete impact on MEO staffing needs. The table below is a summary of the workload provided in the PWS.

Table 1-7: Estimated DOE Federal Training Instances Summary

No.	DOE Elements (from PWS Appendix A)		WOC	AOC
1	Office of Management, Budget, and Evaluation/CFO	ME	918	
2	Office of the Chief Information Officer	IM	0	
3	Office of Congressional and Intergovernmental Affairs	CI	0	
4	Office of Economic Impact and Diversity	ED	0	
5	Office of Energy Efficiency and Renewable Energy	EE	0	
6	Golden Field Office		0	
7	Energy Information Administration	EIA	0	
8	Office of General Counsel	GC	0	
9	Office of Hearings and Appeals	HG	0	

No.	DOE Elements (from PWS Appendix A)		WOC	AOC
10	Office of Independent Oversight and Performance Assurance	OA	0	
11	Office of Policy and International Affairs	PI	0	
12	Office of Public Affairs	PA	0	
13	Office of Worker and Community Transition	WT	0	
14	Office of Security	SO	0	
15	Under Secretary for Nuclear Security/Administrator for National Nuclear Security Administration (NNSA) Headquarters	NA	1736	
16	NNSA Albuquerque	AL		4368
17	NNSA NV	NV		2138
18	NNSA Oakland	LL		474
19	Assistant Secretary for Environment, Safety and Health	EH	0	
20	Assistant Secretary for Environmental Management	EM	494	
21	Assistant Secretary for Fossil Energy	FE	148	
22	National Energy Technology Laboratory, Pittsburgh, PA.	NETL	1165	
23	Strategic Petroleum Reserve Project Office, New Orleans, LA	SPRO	408	
24	Office of Science	SC	149	
25	Office of Civilian Radioactive Waste Management	RW	212	
26	Office of Nuclear Energy, Science, and Technology	NE	151	
27	Chicago	CH	1750	
	Brookhaven Area Office		0	
28	Idaho	ID		2571
29	Oak Ridge	ORO	3051	
30	Ohio	OHIO	862	
31	Rocky Flats	RF		1204
32	Richland	RL		3250
33	Savannah River	SR	1794	
	TOTAL		12838	14005

The purpose of this analysis was to gain a true understanding of the nature and type of customer service and course evaluation workload so the proper number of staff could be placed in the proper location in order to provide complete and responsive customer service. The analysis also provided the basis for dividing work between the WOC and the AOC.

Any changes to this workload will impact the number of required MEO staff and their respective locations.

The analysis included standardizing the titles in the database using course numbers and making simple editorial changes to gain a more accurate picture on the number of different courses for which the MEO training staff would be responsible. This information was particularly important for all of the tasks located in PWS Sections 3.2 (Evaluation) and 3.3 (Customer Service). The number of different courses (and their types) impacted the number of courses requiring evaluation, the amount of customer service needed, and other workload drivers. In total, the 9,376 lines in the database provided in PWS Appendix B equated to 4,355 unique traditional classroom courses, conferences, mandatory courses, computer-based courses, correspondence courses, and interactive television courses.

The MEO Team then attempted to determine which training instances were mandatory. Mandatory training instances do not require the same level of effort, and do not generate the same level of follow-up as external courses. Through interviews of staff, the MEO Team learned that the level of calls and e-mails related to mandatory training is not near the level for external or non-mandatory courses.

The analysis also focused on identifying college and academic, computer-based training (CBT), correspondence, conferences, and interactive television (ITV) courses. These courses do not require maintenance of class rosters and classroom schedules since they take place offsite from the DOE Element virtually all of the time. The class scheduling is often at the convenience of the student or participant. Logistical arrangements do not apply to this segment of course workload.

Table 1-8: Training Courses and Instances by Type

Training Type	No. of Courses			No. of Instances		
	WOC	AOC	TOTAL	WOC	AOC	TOTAL
Regular Course	1831	1324	3155	6665	5390	12055
CBT	7	5	12	9	15	24
Conference	191	89	280	550	435	985
Correspondence	4	10	14	11	37	48
Higher Education	282	107	389	376	173	549
ITV	12	16	28	19	52	71
Mandatory Training	193	196	389	3622	5353	8975
Mandatory CBT	30	48	78	1568	2390	3958
None	5	5	10	18	160	178
TOTALS	2555	1800	4355	12838	14005	26843

In summary, the number and type of course drives the level of staffing.

2.2.1.3 The Development of Other Workload Elements and the Use of Assumptions

The MEO Team made estimates and assumptions of workload for areas where workload was not provided. The MEO Team has the obligation and ability to interview and gather

independent data from affected staff and their supervisors. AT Appendix C-2 shows the sources of data and the assumptions related to each PWS element.

To gather additional data, the MEO Team issued a survey to over 100 staff to obtain workload estimates in a variety of areas, based on the requirements of the PWS. The MEO team tabulated and analyzed the raw data and used it as a basis for determining workload counts.

When the survey did not yield accurate or complete results, the MEO Team used its professional judgment and knowledge of the programs and functions to estimate reasonable workload counts for use in developing the raw staffing numbers for the MEO.

In summary, the workload counts contained in AT Appendix C, which serve as the basis for MEO staffing, were developed using a combination of the reported PWS workload, the knowledge of the staff under study and their supervisors, and the knowledge of experienced MEO Team staff.

2.2.2 Methodology for Examining Workload and Developing MEO Staffing

The MEO Team used a detailed methodology of multiple perspectives to arrive at the needed staffing to perform all of the activities in the PWS to the standards set forth in the Performance Requirements Summary (PRS). The MEO Team understands the implication of adequate staffing and meeting the requirements of DOE to provide training in legal, regulatory, and health safety areas, and as a result the MEO Team was conscientious and diligent when determining staffing. With an understanding of the current organization and analysis of provided workload, the MEO Team had a contextual framework to check and guide staffing numbers and types of staff. The MEO's staffing is a combination of both bottom up analysis and top down analysis.

2.2.2.1 Analysis of and Determination of Task Times and Required Staff Hours

Creating an appropriately staffed and comprehensive MEO requires examining how long it takes to perform a defined task. Numerous approaches were undertaken to determine the time needed to completely fulfill the PWS requirements. These approaches included employee technical estimates, MEO Team technical estimates, and interviews with current employees performing training support services. The MEO Team had to identify how long it should take to perform each activity in order to determine a rational level of staffing for the MEO.

2.2.2.1.1 Employee Technical Estimates

Employee technical estimates were the primary method used to determine the amount of time required to perform PWS tasks, and were ultimately the drivers of MEO hours and staffing. Functional experts and the staff actually performing the tasks are often the best source for technical estimates of task times. Technical estimates are also useful tools when estimating tasks that are integrated in the midst of many other tasks, such as analysis, customer service, and other administrative tasks.

As mentioned in Section 2.2.1.3, the MEO Team solicited estimates from employees throughout DOE performing training support services in the form of a survey, based on PWS requirements. The MEO Team obtained technical estimates from approximately 66 Federal and contractor staff at different Headquarters and field offices.

A master database was created and coded to assist in the analysis. Task times provided by staff were reviewed for internal and external validity, and follow-up questions further

clarified apparent discrepancies. Outliers were denoted and excluded from the calculations of appropriate tasks times. For the purposes of this analysis, outliers were defined as data that was either non-responsive and did not answer the specific survey question, data that greatly exceeded the reasonable range of responses, or data that exceeded the accepted standard deviation for that specific group of data.

The resulting technical estimate times were then applied to the workload to create total unadjusted required hours. (A straight multiplication of workload by task time equals unadjusted required hours.) AT Appendix C-1 shows the required hours, and AT Appendix F summarizes the labor category, grade, FTE, and location by PWS Functional Area (e.g., 3.1 and 3.2). Refer to AT Appendix D for further explanation of “Unadjusted Required Hours.”

2.2.2.1.2 Technical Expert Technical Estimates

The MEO Team also used its own expertise to estimate the required hours for specific tasks. When the surveys did not reveal enough detail, or when the number of respondents was not sufficient to draw a meaningful statistical conclusion, the expertise of the MEO Team became the primary resource. These conclusions are noted in AT Appendix C-2.

2.2.2.1.3 Interviews with Current Staff Performing PWS Tasks and Activities

Additionally, the MEO Team identified current staff performing all of the tasks within the PWS to gain a perspective on the scope and time being spent on training support services. The current staffing numbers provided the level of staffing, without adjustments and improvements, that could handle the existing workload. Extensive interviews with staff helped in developing baseline staffing and served as a check against the data received in the surveys.

2.2.3 Understanding the Current Organization’s Structure and Staffing

2.2.3.1 The Nature of the Current Organizational Activities and the Impact on the Development of the MEO

The current DOE Training Support Services organization performs its varied mission in a professional and thorough manner, adding value to the larger DOE community. The professional training support staff provides employee development, leadership/managerial development, and TQP support activities. The current organization serves a wide range of technical, scientific, and administrative personnel, and helps personnel meet organizational and personal training objectives.

The current organization is providing a full range of training functions including both contractible activities identified in the PWS and Inherently Governmental requirements that are expected to remain in the CGO. The following is a list of contractible activities and services the current organization is doing and the MEO will continue to provide.

- Assisting and advising on needs assessment
- Assisting in course development and evaluation
- Advising on training services procurement activities
- Announcing new courses
- Evaluating existing courses and gathering and analyzing broad program-related evaluations

- Providing subject matter expertise
- Providing customer services for course registration
- Maintaining class schedules
- Maintaining training records
- Issuing a range of site-specific reports
- Managing and administering applications and subscriptions for web-based training
- Serving as subject matter experts and advisors for a wide range of Employee and Career Development Programs

The MEO Team recognizes that different locations have various approaches to performing these tasks; however, the proposed MEO as described in more detail in Factor Two, has chosen selected approaches to improve the consistency of training services provided.

2.2.3.2 The Nature of the Current Organizational Structure and its Impact on the Development of the MEO

To better understand the MEO's proposed structure, it is necessary to understand the progression from the current organizations under study. At the time of the competition, a wide range of training activities were performed throughout the DOE organizations under study at multiple locations. While this AT will not go into details, the structures of the many training organizations are as diverse as the customers they serve.

The philosophy and method of providing services by the current organizations are designed to meet mission-specific needs. The MEO Team understood that training was primarily a local activity, physically occurring at the DOE field and headquarters sites. Providing training as close as possible to customers is the most cost-effective and logical approach. Additionally, the vast increase in the number of training courses obtained via distance education has opened up opportunities for staff to receive both mandatory and elective training without leaving their home site. The nature of this change affects the structure of the MEO.

The MEO Team took these changes into consideration when developing the MEO; however, the MEO Team still recognized the potential for improvements by concentrating certain activities and re-allocating staff.

2.3 HUMAN RESOURCES ALLOCATION CONCLUSION

The development of the organizational structure and management authorities of the MEO was based on thorough analysis of the data and workload provided, as well as other data and information gathered from the current organization. The proposed MEO structure also takes into consideration the processes by which the tasks will be performed, which is detailed further in Evaluation Factor Two.

Using detailed analysis, the MEO Team has allocated human resources to perform training support services in the most efficient and cost-effective way possible. The MEO Team also acknowledged the need to provide representatives in specific locations in order to best serve the customers. The hierarchy of the Organization will allow key areas and locations to have staff on-site and all DOE Elements to receive a high level of service.

3 EVALUATION FACTOR TWO - TECHNICAL APPROACH

3.1 BACKGROUND

The MEO for the DOE Training Support Services function has been developed from a time-tested organization with a history of outstanding mission performance in support of the DOE. The methods of operation are taken directly from successful current approaches, or derived from exemplary approaches currently in place at one or more of the sites under study. Since the MEO will utilize processes employed by the current organization, it does not carry a high level of organizational risk. Furthermore, MEO development was based on a thorough evaluation of options for the Training Support Services function given the present and projected circumstances in DOE.

The Technical Approach proposed by the MEO Team utilizes cost effective methods while meeting or exceeding the performance standards specified in the PWS. This Section demonstrates the MEO's technical capability and proficiency, and highlights its performance abilities for each Functional Area in the PWS. This section will also demonstrate that the MEO is a comprehensively developed organization meeting all the requirements of the PWS, and the most effective and efficient choice to perform the DOE Training Support Services function.

3.1.1 Understanding the PWS and Solicitation Requirements

The PWS was analyzed in detail to ensure the MEO satisfied each and every performance-based requirement. The MEO staffing is based on an analysis of workload, grade requirements, historical staff-hour usage, task time and frequency measurements, employee interviews, process analyses, and technical estimates, and is directly linked to the requirements of the PWS. AT Appendices A and C are crosswalks that show, by PWS task, the unadjusted and adjusted MEO staffing hours associated with each task, and show the direct relationship between the PWS and MEO. (A full explanation of unadjusted and adjusted staffing hours can be found in AT Appendix D.) The adjusted staffing is used in the Volume III Price Proposal. AT Appendix G is a summary of workload drivers by functional area.

3.1.2 Task Interrelationships

The DOE Training Support Services function is characterized by significant task interdependence. Training is a continuum of services that stretch from the individual and specific job needs, to the organizations' articulation of needed skills and proficiencies through the delivery and completion of the training course.

The MEO Team analyzed every PWS task in each Functional Area to determine the required level of interaction with other Government entities and training-related organizations. As a result, the MEO is structured to optimize inter-group teamwork and coordination. By centralizing a large portion of work to two main locations, the MEO will encourage communication among Functional Areas and allow for efficient and effective performance of the PWS tasks.

3.1.3 Space and Equipment Requirements

The MEO will use the existing DOE facilities and office resources provided by the Government as stated in PWS Section 6.2 and detailed in PWS Appendix C. The MEO has proposed staffing levels that are appropriate for the office space available. The MEO will

utilize available existing space, office equipment, telephone, computers, and maintenance services at the locations identified in Table 3-1.

Table 3-1: MEO Locations

Location	MEO Office	FTE
Washington, DC	Headquarters Core Group	8.00
Washington, DC	Washington Operations Center (WOC)	25.00
Albuquerque, NM	Albuquerque Operations Center (AOC)	23.00
Aiken, SC	Savannah River Liaison Site	1.00
Chicago, IL	Chicago Liaison Site	1.00
Idaho Falls, ID	Idaho Liaison Site	1.00
Oak Ridge, TN	Oak Ridge Liaison Site	1.00
Richland, WA	Richland Liaison Site	1.00
TOTAL		61.00

3.2 FUNCTIONAL AREA REQUIREMENTS

Narrative descriptions and staffing charts are provided below for each Functional Area of the PWS. The key standard operating procedures and processes are explained to demonstrate the comprehensive approach that the MEO will employ to meet the each of the PWS requirements. Explanation is also provided to convey an understanding of how the MEO will actually perform each of the tasks. The process descriptions were gathered through numerous interviews with experienced Training Support Services staff at the current locations.

The following table shows the total FTE allocated for each Functional Area.

Table 3-2: Total FTE by Functional Area

Functional Area	PWS Reference	Number of Full-Time Personnel for the Effort
Needs Assessment	3.1	3.547
Evaluation	3.2	10.451
Customer Service	3.3	20.262
Subject Matter Expertise	3.4	3.464
Employee Development	3.5	4.721
Technical Qualification Program Support	3.6	5.575
General Requirements	2.1	4.404
General Requirements	5.0	1.344
Supervision and Indirect	N/A	7.229
TOTAL		61.00

* Note 2 Information Specialist positions divided 1.0 FTE to PWS 2.1, 0.5 to PWS 5.0, and .5 FTE to Supervision and Indirect.

3.2.1 Staffing By Location and PWS Task

Table 3-3 identifies where each of the functional activities will be performed, by primary and secondary locations. Primary locations are the main sites where the activity will be performed. Secondary locations are sites where the task may not be a main function or contain major workload hours, or where the task is handled only when needed as a back-up to a primary site.

Table 3-3: Functional Area by Primary and Secondary MEO Performing Location

Functional Area	Primary	Secondary
3.1 Needs Assessment	<ul style="list-style-type: none"> • Core Group • WOC • AOC • Chicago Liaison Site • Idaho Liaison Site • Oak Ridge Liaison Site • Richland Liaison Site • Savannah River Liaison Site 	
3.2 Evaluation	<ul style="list-style-type: none"> • WOC • AOC 	<ul style="list-style-type: none"> • Chicago Liaison Site • Idaho Liaison Site • Oak Ridge Liaison Site • Richland Liaison Site • Savannah River Liaison Site
3.3 Customer Service	<ul style="list-style-type: none"> • WOC • AOC 	
3.4 Subject Matter Expertise	<ul style="list-style-type: none"> • Core Group • WOC • AOC • Chicago Liaison Site • Idaho Liaison Site • Oak Ridge Liaison Site • Richland Liaison Site • Savannah River Liaison Site 	
3.5 Employee Development	<ul style="list-style-type: none"> • Core Group • WOC • AOC • Chicago Liaison Site • Idaho Liaison Site • Oak Ridge Liaison Site • Richland Liaison Site • Savannah River Liaison Site 	
3.6 Technical Qualification Program Support	<ul style="list-style-type: none"> • Core Group • WOC • AOC 	

Functional Area	Primary	Secondary
2.1 General Requirements	<ul style="list-style-type: none"> • Core Group • WOC • AOC 	<ul style="list-style-type: none"> • Chicago Liaison Site • Idaho Liaison Site • Oak Ridge Liaison Site • Richland Liaison Site • Savannah River Liaison Site
5.1 Quality Control Plan 5.2 Quality Control 5.5 Meetings	<ul style="list-style-type: none"> • Core Group 	<ul style="list-style-type: none"> • WOC • AOC
5.10 Library Maintenance	<ul style="list-style-type: none"> • Core Group 	

3.2.2 Needs Assessment (PWS Section 3.1)

The MEO proposes the staffing detailed in Table 3-4 to accomplish the Needs Assessment requirements. Major tasks will be performed at the WOC, AOC, and all Liaison Sites. The Core Group will consolidate the needs assessment data and provide additional assistance and oversight as needed.

Table 3-4: Needs Assessment Staffing

PWS Functional Area	Labor Category	Grade	Skills
3.1	Corporate Training Specialist	GS-12	<ul style="list-style-type: none"> • Verbal and written communication • Ability to perform data analysis • Understanding of workforce planning • Understanding of changing mission needs and priorities • Understanding of competency standards • Ability to assess the impact of short and long-term goals • Ability to assess technical and non-technical needs • Ability to query IDP in ESS • Knowledge of HCMIP
3.1	Human Resources Specialist (Liaison)	GS-12	<ul style="list-style-type: none"> • Verbal and written communication • Understanding of workforce planning • Understanding of changing mission needs and priorities • Understanding of competency standards
3.1	Human Resources Specialist	GS-12	<ul style="list-style-type: none"> • Verbal and written communication • Ability to perform data analysis • Understanding of workforce planning • Understanding of changing mission needs and priorities • Understanding of competency standards • Ability to assess the impact of short and long-term goals • Ability to assess technical and non-technical needs

PWS Functional Area	Labor Category	Grade	Skills
3.1	Human Resources Specialist	GS-11	<ul style="list-style-type: none"> • Verbal and written communication • Ability to perform data analysis • Understanding of competency standards • Ability to analyze requirements to determine new training needs

Needs Assessment is an important aspect of the training cycle. Identifying organizational, occupational, and individual needs for the coming year supports development of the Annual Training Plan and supports budget decisions as they relate to critical human capital management needs of the Department. The Department's implementation of the President's Management Agenda initiative on Human Capital Management has resulted in major DOE programs developing workforce plans to identify skill gaps in critical occupations and developing succession plans to address future needs. While the workforce planning process results in skill and succession needs that often translate into training needs, there has been little evidence of a link between workforce planning and training Needs Assessment. In addition, Departmental organizations do an annual self assessment of their Human Capital Management programs using the Human Capital Management Improvement Program (HCMIP). While HCMIP contains findings that identify weaknesses for further action, these findings are not routinely used to focus training needs assessments.

An analysis of current needs assessment across the Department shows a large variance in the methodologies used and the level of detail. Organizations that expended the resources for detailed needs assessments were realizing a marginal change in identified training needs, and organizations that expended fewer resources for a less detailed needs assessment had limited knowledge of their true training needs.

The MEO Team proposes an efficient and cost-effective approach to Needs Assessment that addresses the shortcomings identified above. This new approach utilizes information from existing Departmental systems, along with a rotational approach to further needs analysis. The rotational approach will include an annual determination of specific Departmental areas of focus based on Departmental priorities, findings from the HCMIP, and findings from internal and external reviews of the Department. As a result, the traditional needs assessment process will be better integrated with the existing workforce analysis and succession planning processes. The MEO will provide guidance and mentoring to Elements as they develop their Needs Assessments and training plans to ensure that needs identified through the workforce planning process, needs associated with specific Departmental areas of focus, and needs identified through use of the IDP process result in realistic assessments that address organizational, occupational, and individual training needs. The end result will be Needs Assessments that will be rolled into realistic training plans that are better integrated with existing Departmental initiatives, more focused on Departmental priorities, and more supportive of budget decisions.

The MEO Team proposes Needs Assessment as a multi-phased activity. The first phase will occur on an annual basis when training support staff at the Operations Centers assist each DOE Element in identifying its critical needs by preparing and consolidating Needs Assessment data in coordination with the workforce analysis and succession planning processes. This assessment will encompass organizational, occupational, and individual needs as required in PWS Section 3.1.1. Training staff, specifically GS-12 Human

Resources Specialists and Human Resources Specialists (Liaison), will utilize completed IDP, wherever available. The MEO will encourage all DOE staff to utilize the Employee Self Service (ESS) system for completing IDP. This will allow MEO staff to electronically access and analyze IDP and supports the Presidential E-Government/E-Learning initiatives.

Training staff at the Operations Centers and Liaison Sites will be assigned to specific DOE Elements and will deal directly with the supervisory level positions to establish close working relationships. The intent is for a free and open dialogue and the sharing of information throughout the year between the Human Resources Specialists and Human Resources Specialists (Liaison) and the Element supervisors. Frequent interaction between MEO staff and the Element will help to create a long-term relationship where the needs of the Element are annually assessed and discussed and continuity of service is maintained.

The Human Resources Specialists and Human Resources Specialists (Liaison) will converse with Element supervisors on issues such as meeting legal training requirements, specific DOE regulations, occupational needs, and individual needs. At this stage, the Human Resources Specialists and Human Resources Specialists (Liaison) will also learn and understand if new training requirements exist, and if so, will work closely with the Element to gauge the logistical, technical, and cost implications of the new requirements.

The next phase in the process is to consolidate data from individual DOE Elements' Needs Assessments with data from all the other Elements to create a detailed analysis of the actual training needs for the upcoming year. The Corporate Training Specialists at the Core Group will perform this task. The analysis will look for common courses, the chance to combine individual needs into unified classes, if training should be provided at a particular location, the potential cost implications of each type of training, and if cost effective methods exist to lower the financial burden on the elements themselves. This analysis will help to further show common organizational and occupational needs. This analytical approach will result in a continual feedback loop, ultimately allowing Element supervisors to decide their training future for the year. This analysis will be completed by June 30 of each year in accordance with the PWS.

The Corporate Training Specialists at the Core Group will utilize data and information from the DOE Element assessments, eliminate duplications, and validate training needs with DOE-wide initiatives. The Corporate Training Specialists will analyze the data to identify multi-element needs. Additionally, the Corporate Training Specialist will coordinate and evaluate the multi-element training Needs Assessments to meet DOE-wide training program objectives in accordance with PWS Section 3.1.2.

Furthermore, the Human Resources Specialists at each of the Operations Centers (in close coordination with the TQP Manager, TQP representatives, and staff assigned responsibilities for Career Development Programs) will assist in the development of new Needs Assessments when new training requirements are issued, when job performance is identified as below standard, and when requests for changes to current training or for new training are received in accordance with PWS Section 3.1.3. A combination of the existing information gathered for the annual needs assessment and new information will be the basis of recommendations, and the continuing dialogue among the many parties involved in determining training needs. One specific technique already employed at one of the MEO locations is the use of web-based surveys to help gather training needs information.

3.2.2.1 Workload Drivers

Staffing was determined based on the following Needs Assessment workload drivers:

- Number of DOE Elements supported
- Number of employees at each element
- Number of IDP completed
- Number of new needs assessments

3.2.2.2 Meeting Performance Standards

The proposed technical approach allows the MEO to provide assistance with annual and ad hoc Needs Assessments that accurately reflect organizational, occupational and individual training needs of DOE by June 30 annually. As discussed above, the MEO will encourage ongoing interaction with the supervisory positions at the DOE Elements. The Human Resources Specialists and Human Resources Specialists (Liaison) will be informed of the needs of their supported Elements throughout the year, allowing them to efficiently roll-up, validate, and document the needs by June 30. Their familiarity and relationship with the Elements will ensure the assessments accurately reflect the needs of each Element. The Corporate Training Specialists will ensure that the assessments meet DOE-wide needs and objectives.

3.2.3 Evaluation (PWS Section 3.2)

The MEO proposes the staffing detailed in Table 3-5 to accomplish the evaluation requirements. The requirements in PWS Section 3.2 are grouped into the following three categories discussed below: course-offering evaluation, course procurement support, and feedback and analysis. Course-offering evaluation will be performed primarily at the WOC and AOC with limited support provided at the Liaison Sites. Course procurement support and feedback and analysis tasks will be performed at the WOC and AOC.

Table 3-5: Evaluation Staffing

PWS Functional Area	Labor Category	Grade	Skills
3.2	Quality Control Management POC	GS-13	<ul style="list-style-type: none"> • Ability to analyze data and draw conclusions • Ability to compile data • Ability to formulate and report on recommendations • Understanding of training goals and objectives
3.2	Human Resources Specialist (Liaison)	GS-12	<ul style="list-style-type: none"> • Ability to analyze data and draw conclusions • Ability to compile data • Understanding of training goals and objectives
3.2	Human Resources Specialist	GS-12	<ul style="list-style-type: none"> • Ability to analyze data and draw conclusions • Ability to compile data • Understanding of training goals and objectives
3.2	Human Resources Specialist	GS-11	<ul style="list-style-type: none"> • Knowledge of procurement rules and regulations • Ability to formulate recommendations

PWS Functional Area	Labor Category	Grade	Skills
3.2	Human Resources Specialist	GS-09/11	<ul style="list-style-type: none"> Familiar with course curriculum organization Knowledge of training principles Understanding of the systematic approach to training

3.2.3.1 Course-Offering Evaluation

The MEO will perform various types of evaluations on 25% of the course offerings each quarter. These evaluations include reviews of course curriculums and learning objectives, testing, materials, and training methods as required by PWS Sections 3.2.1 through 3.2.14. Evaluation of courses, as described in the PWS, will require professional knowledge and experience. MEO staff will verify that training is conducted in accordance with DOE policies and procedures to include DOE Order 360.1B and DOE Manual 360.1-1B. It is envisioned that the staff's familiarization with DOE policy, as well as experience in using CHRIS, mining data, and training in general, will combine with the knowledge of the site's specific courses obtained over the years to effectively understand and efficiently evaluate courses and related materials.

The MEO will use a systematic approach to meet these evaluation requirements. A single position will be responsible for a specific set of course offerings from a specific group of DOE Elements. The GS-09 Human Resources Specialists performing this function will utilize a standard checklist to ensure each of the PWS requirements is addressed for each course-offering evaluated, and courses are evaluated in an equitable manner. An example of this checklist is provided in AT Appendix H. This checklist will serve as a guideline only; staff will refer to more thorough checklists and forms contained in DOE HDBK 1078-94 as appropriate.

The course-offering evaluations will not necessarily require travel to the course location or attendance at the course by the Human Resources Specialists. The majority of the required evaluations include checking and reviewing tangible items, such as course curriculum and lesson plans, printed materials, tests, completed evaluations, and course schedules. All course related documentation will be requested from training providers, and receipt of materials will be tracked in an electronic spreadsheet. The Human Resources Liaisons may assist with evaluation tasks if on-site requirements arise. Time has been included in the liaison positions for this support.

Using their intimate knowledge of the Element's needs assessment, the Human Resources Specialists will review and verify course offerings to ensure training is based on the stated priorities in the needs assessment. Since the priorities will be identified and discussed in the needs assessment process, the Specialist will be able to make this determination easily. Checking for the relationship to the needs assessment provides the opportunity to also verify course offerings are aimed at targeted learning objectives and reflect job performance requirements (i.e., knowledge, skills, and abilities). Knowledge of the vendors and actual courses, many of which may be repeat courses from previous years, and training in general is essential to perform this activity. The documented evaluation will include review of the appropriate method, setting, and format of the course.

When courses are evaluated for relevance to the needs assessment, Human Resources Specialists will also focus on training results and tests. With technical classes, the help of the MEO SME and the TQP Manager may be employed. When effective and thorough tests are identified, the Specialists will ensure these tests are incorporated into a pre-determined test bank.

The MEO will continue the process of reviewing and analyzing student-provided course evaluations, which may include surveys completed at the end of a course, tests, or follow-up with students at a time after the course is completed. Evaluations will be gathered and catalogued systematically so that useful information can be pulled for each of the courses. In most cases, students fill out evaluation sheets, which are submitted in hard copy. The MEO staff will strongly encourage, and assist with, completion of evaluations. Human Resources Specialists will then consolidate and further analyze these responses, identify potential areas of concerns, and take action as necessary (e.g., notify COR or conduct further evaluations).

MEO Customer Service (discussed in section 3.2.4) staff may be consulted for input during the evaluations of course loading and scheduling requirements in accordance with DOE-HDBK-1078-94, Chapter 3, Section 3.5.2.

3.2.3.2 Course Procurement Support

As stated in PWS Section 3.2.16, the experienced and knowledgeable MEO staff will recommend new training providers and assist the COR with course procurement activities. To achieve this, GS-11 Human Resources Specialists with knowledge of the local market will conduct market surveys on the availability, schedule, and cost of needed courses. This information will be supplied to the COR for final approval of the course chosen. Additionally, the Human Resources Specialists will continue to maintain lines of communication with the customers affected by the procurement process. It is important to note that MEO staff does not have the authority to obligate Government funds to obtain a class.

Market surveys are just one of many types of course procurement analyses the MEO can assist with. The Human Resources Specialists will also provide assistance in drafting work statements, identifying evaluation criteria, compiling solicitation documentation, and evaluation proposals. They will provide input to new Statements of Work (SOW) based on their knowledge or a review of the existing training SOW, in collaboration with procurement specialists. The Training Specialists, by the fact that they know the needs of the DOE Elements, will be in a unique position to determine evaluation criteria (i.e., experience, delivery methods, location, and cost) that matter most to the DOE Elements and their management. This will place the Human Resources Specialists in the ideal position to compile solicitation documentation, and assist in evaluating proposals for training courses, seminars, general training, and support services.

It should be noted that these procurement activities are not a new set of functions, and all are currently provided by the DOE Training Support Services function under study.

3.2.3.3 Feedback and Analysis

The MEO will utilize SME, the data gathered in the needs assessments, and employee and supervisor feedback to ensure training needs are met with existing courses, or can be met with proposed new courses. If necessary, the GS-12 Human Resources Specialists will assist the COR with data collection and cost-benefit analyses of courses, as referenced in PWS Section 3.2.20. Cost-benefit analyses are performed at many of the training sites

today and staff are familiar with the approach. In fact, the NNSA Service Center has a cost-benefit analysis methodology that takes into account travel costs, direct and indirect expenses, and staff time. The MEO will employ this methodology at both of the Operations Centers.

To meet requirements in PWS Section 3.2.17, the MEO will utilize GS-12 Human Resources Specialists in the WOC and AOC to gather employee and supervisor feedback on training adequacy and the training system's ability to meet the goals and objectives. When customers call the Centers, they will be asked two or three prepared questions related to the area of training, for example effective use of employee and supervisor evaluations of training sessions. These questions will not be lengthy nor in-depth so as not to discourage customers from calling the Operations Centers. The WOC and AOC Deputy Project Managers and Team Leads will analyze these responses to gauge overall customer satisfaction.

In accordance with PWS Section 3.2.19 and if requested by the COR, the GS-12 Human Resources Specialists may also collect data on behavior changes of students, in accordance with DOE Order 360.1B, Section 4g and DOE HDBK 1078-94, Section 6. When this request is made, the Core Group will receive notification from the Human Resources Specialist so the SME in evaluation and survey development can be tapped as a resource.

3.2.3.4 Workload Drivers

Staffing was determined based on the following Evaluation workload drivers:

- Number of course offerings
- Estimated number of new courses to be procured
- Number of employee and supervisor feedback surveys or evaluations received
- Number of cost-benefit analyses performed

3.2.3.5 Meeting Performance Standards

This technical approach allows the MEO to propose evaluation services that meet or exceed the various quality and timeliness performance standards. As required, a systematic approach will be used to perform evaluations on 25% of course offerings each quarter. Experienced and knowledgeable personnel will assist the COR with evaluation duties to ensure documents will be delivered on-time and in an acceptable manner. As requested by the COR senior Training Support Services staff will perform analyses to ensure that information is carefully presented and submitted by the specified due date.

3.2.4 Customer Service (PWS Section 3.3)

The MEO proposes the staffing detailed in Table 3-6 to accomplish the Customer Service requirements. Customer Service will be centralized at the WOC and AOC.

Table 3-6: Customer Service Staffing

PWS Functional Area	Labor Category	Grade	Skills

PWS Functional Area	Labor Category	Grade	Skills
3.3	Corporate Training Specialist	GS-12	<ul style="list-style-type: none"> • Technical understanding of CHRIS capabilities • Understanding of web-based training systems • Ability to analyze data and draw conclusions • Ability to compile data • Understanding of the DOE Working Capital Fund • Understanding of web-based training systems
3.3	Human Resources Specialist (Team Lead)	GS-09/11	<ul style="list-style-type: none"> • Excellent verbal and written communication • Ability to perform data analysis • Ability to use and query CHRIS Training Administration module • Skill in organizing and writing reports
3.3	Human Resources Specialist	GS-09/11	<ul style="list-style-type: none"> • Ability to perform data analysis • Ability to use and query CHRIS Training Administration module • Skill in organizing and writing reports • Understanding of web-based training systems
3.3	Human Resources Assistant	GS-07	<ul style="list-style-type: none"> • Excellent verbal and written communication • Ability to use CHRIS Training Administration module • Ability to prioritize work • Understanding of basic training policies and procedures
3.3	General Clerk	GS-05	<ul style="list-style-type: none"> • Ability to organize information • Ability to meet departmental records and file procedures • Ability to type correspondence and properly deliver mail

The requirements in PWS Section 3.3 are grouped into the categories of general inquiries and responses, course registration, training communication, class logistical support, records management, reporting, web-based training, and CHRIS interaction and testing, which are discussed below.

3.2.4.1 General Inquiries and Responses

This section discusses the MEO's approach to performance of general inquiries and response tasks in PWS Section 3.3.5. The daily and weekly process of interacting with customers will continue under the MEO; the only true difference will be the phone number dialed by some customers.

The GS-07 Human Resources Assistants will have the primary responsibility for these tasks. Staff at the WOC and AOC will be trained and knowledgeable to answer the majority of the course registration, course availability, training approval inquiries and other inquiries that are received. This will present a challenge since the inquiries, as well as the responses, will vary greatly by location and by type of staff. To address this variation, it is envisioned that Human Resources Specialists will work closely with Human Resources Assistants to develop a summary of the most common questions, issues, and the proper consistent response. This summary will be updated regularly to reflect the rapidly changing nature and needs of the training environment. When inquiries are received, the Human Resources Assistants will assess if the question can be answered immediately or if they require further research. If the question cannot be answered immediately, the Human Resources Assistants will refer to the aforementioned summary. Additionally, in the event that an inquiry requires greater knowledge, extensive research, or requires more of a policy determination, the Deputy Project Manager or Human Resources Specialists (Team Lead) will address the issue. If needed, the Deputy Project Manager will contact the appropriate staff at the Core Group for clarification to ensure correct information is delivered to customers.

Having a specific protocol that directs questions to knowledgeable staff will permit the MEO staff to provide initial responses to incoming phone calls, e-mails, and other inquiries within one hour of receipt and provide necessary follow-up responses within one working day.

The MEO recognizes inquiries are generated by several different sources including, but not limited to, employees and managers, vendors, peer training managers, and other external or internal sources. Inquiries from parties such as GAO, Congress, the Office of the Inspector General, OPM, and Headquarters will immediately be elevated to the Core Group for senior management response. The approach to resolve these higher level inquiries may encompass drawing on the expertise of the Corporate Training Officer, Corporate Training Specialists, TQP Manager, or other knowledgeable personnel. Due to the variety of inquiries received, no definitive response process can be described. However, some inquiries may be resolved quickly (with one or two contacts), and others may require research or may need to be referred to another organization. The fact that certain inquiries will be extremely time consuming has been accounted for in the staffing for this task.

3.2.4.2 Course Registration

This section discusses the MEO's approach to meeting course registration requirements in PWS Sections 3.3.2, 3.3.4, 3.3.8, and 3.3.10. Course registration will be handled through CHRIS. Questions on the registration process, problems encountered when trying to register, and general registration assistance will be addressed by the Operations Centers. Human Resources Assistants will also assist customers search for training courses in existing course catalogs (e.g., CHRIS). Prior to completing a registration request, the Human Resources Assistants will confirm student or attendee authorization for training, including checking for signatures (as required by the procedures in DOE Manual 360.1-1B, Chapter I, Section 8), and will ensure that the student does not have any outstanding issues (e.g., failed courses) from past training instances.

Human Resources Assistants will ensure a confirmation with the class date, place, and time is sent to the student by e-mail or via phone if e-mail is unavailable or inappropriate. The Human Resources Assistants will also be able to clarify issues such as the existence of multiple course sections and sessions, when no sessions are available, or when cancellations occur.

Human Resources Assistants will be assigned specific DOE Elements to ensure a knowledge base is built regarding the sites' specific needs. This specialization of staff will help maintain the continuity of service and familiarity with the nature of the sites' needs. However, all Operations Center staff will be able to assist all customers as necessary. This familiarity with the Elements' needs and requests will also allow the Human Resources Assistants to recommend optimum DOE student or attendee enrollment and attendance levels for courses, seminars, workshops, and other DOE programs to the COR by monitoring registration lists and contacting supervisors to determine student availability and interest in DOE programs.

The Human Resources Assistants will also process registrations for DOE training initiated by non-DOE personnel. In accordance with PWS Section 3.3.11, these requests must be forwarded to the COR for review and approval. These course registrations will be handed to the Deputy Project Manager at the Operations Center who will deal directly with the COR. The registration process will not continue until approval is received. The MEO Team envisions a more intensive customer service routine for non-DOE individuals due to the nature of interagency training agreements and cost and payment issues.

3.2.4.3 Training Communication

Currently, at every location, training support services staff distribute training-related communications in accordance with PWS Sections 3.3.6 and 3.3.7, and maintain lists of names and contact information for training-related personnel in accordance with PWS Section 3.3.14. Communications may include information on training-related issues and announcements of courses and programs. The MEO's approach is to continue to provide training-related communications, but with a more centralized approach.

A variety of factors may initiate the announcement and communications process including customer inquiries and needs, annual plans, and policy changes or implementation (including both law and DOE order). Human Resources Assistants will use a variety of means to get the announcements out to affected DOE staff. Broadcasts, such as DOECASTS and videoconferencing may be used; however, course offerings will generally be announced to a targeted audience through e-mails.

Targeted audience communications will be used to convey announcements, messages, or requests to a specific group of individuals. Currently, contact lists are maintained for the different targeted audience groups. These targeted communications may be through e-mail, memoranda, teleconferencing, videoconferencing, or other media. Individual communications are used to convey information to a single person, and may utilize phone calls, e-mail, memoranda, or other media. Additional communications will take place through the maintenance and updating of training support services websites. The information conveyed by website is self-service; that is, it does not go out to any specific audience, but is available for those people who are looking for it.

The Operations Centers' staff will also send directed e-mails to existing and to-be developed e-mail lists regarding course offerings. These lists exist at virtually all locations and will be incorporated into the new Operations Centers.

The MEO recognizes the CGO staff will notify Operations Center staff of new courses available in CHRIS that need to be announced to the DOE community.

3.2.4.4 Class Logistical Support

The Human Resources Assistants will establish and maintain class folders, maintain class and classroom schedules, verify that clearance requirements for secured classes are met,

produce class rosters and certificate lists, and prepare certificates of completion in accordance with PWS Sections 3.3.4, 3.3.12, and 3.3.13. Training staff may also interact with the local facility staff as they find and schedule locations and rooms, arrange equipment, coordinate with vendors, and provide information on accommodations to incoming students and trainers. The Human Resources Assistants will establish and maintain communications with the DOE Elements or DOE Contractors, and training manager POC from each Element, as well as outside agencies, as needed. The MEO will maintain a list of names and contact information that will be used if questions arise regarding logistical arrangements.

Class rosters are currently, and will continue to be, produced by coding and processing student information, and verifying and correcting enrollment, withdrawal, and course completion information. Human Resources Assistants will distribute rosters to supervisors, vendors, and others, and maintain class rosters in class folders in accordance with DOE Order 360.1B, Sections 4g, 4h, and 4i. All course and registration information will be maintained in CHRIS in accordance with the CHRIS HR Users' Manual, 4 and the CHRIS TR Users' Manual, Chapter 3, as specified in the PWS.

3.2.4.5 Records Management

The MEO has a number of records management requirements that must be fulfilled to document the training program and trainee participation. The types of records that must be kept include student/attendee enrollment records, training and qualification records, and course records required by PWS Sections 3.3.3 and 3.3.15. The file formats for training records may include CHRIS, DOE/*Info*, ESS, or other database records, electronic files, hard copy files, web-based training records, site-specific employee records, and archived files. The Operations Centers must prepare, distribute, store, control, and retrieve records as required. The MEO staff will follow established Government and DOE guidelines, as well as PWS Section 2.3 for file and records management.

3.2.4.6 Reporting

There are various customer service reporting requirements specified in PWS Sections 3.3.3, 3.3.9, 3.3.16, 3.3.19, and PWS Appendix D. Each type of report has been assigned to a specific position or positions in the MEO to ensure timeliness standards (which are as short as a few days) and quality standards (which demand few rewrites and edits) are met.

The types of reports demanded include monthly, year-to-date, and on-demand training administration reports on student data, a quarterly report on training adequacy, DOE Working Capital Fund reports, and other ad hoc reports as requested. The GS-09 Human Resources Specialists will produce all reports other than the DOE Working Capital Fund reports. The Human Resources Specialists will also produce reports regarding courses, classes, students/attendees, customers and POC, as well as compile other training and registration-related information.

The generation and development of formal reports can occur either through a DOE automated system (e.g., CHRIS or DOE/*Info*) or manually, which are more time consuming. Human Resources Specialists will have responsibility for developing reports in the requested format and verifying the accuracy of the information. Each report will be accompanied with an explanation of the strengths and weaknesses of the data so the COR can assess the usefulness of the report. All reports will be reviewed by the Quality Control Management POC, the MEO's data and information control point.

The MEO will also provide routine or informal reports using CHRIS. The Human Resources Assistants, the Human Resources Specialists (Team Lead), and other designated staff, will produce a range of student data reports for internal use and for the CGO. Most likely this will include, if similar to the reporting actually done today by DOE training staff, monthly, year-to-date, and on-demand reports on student positions and locations and a range of custom or special reports on student data and information.

A Corporate Training Specialist from the Core Group will attend Working Capital Fund meetings and will prepare and analyze draft financial reports as requested by the COR. These DOE Working Capital Fund meetings are held quarterly as specified in PWS Section 3.3.19.

Additionally, special reporting requirements may arise out of a Congressional inquiry, DOE Order, or a management request from OMB, OPM, DOE Element management, or other Government officials or organizations. These will be elevated to the Core Group immediately for completion.

3.2.4.7 Web-Based Training Systems

In response to PWS Section 3.3.17, the MEO will provide a supporting role in ensuring web-based training systems are available for all DOE training customers. It is expected that, per a request by the COR, GS-07 Human Resources Assistants at the Operations Centers will serve as central contacts for subscriptions for web-based training systems. The respective points of contact at the DOE Element sites will forward a consolidated list of the total number of subscriptions and costs that need to be reserved and paid for in the Working Capital Fund. The Human Resources Assistants will forward these lists, maintain documentation of the transfer, and answer any web-based training related questions.

Additionally, Human Resources Assistants will receive the applications for new and transferred staff to gain access to the web-based training system. The MEO staff will review the applications for completeness and accuracy and contact with the requester if there are any problems. As the application progresses over a number of weeks, the status of access will be provided to the requestor. Approving the applications is a CGO function.

When requested by the COR, Corporate Training Specialists will critique and analyze the benefits and risks of using web-based training, and place the use of these systems in the larger context of the needs of the customers and the overall needs of DOE. The Corporate Training Specialists must be familiar with the latest software, e-learning tools, and applications to perform this task and a range of other consultative and liaison tasks in the PWS.

3.2.4.8 CHRIS Interaction and Testing

The MEO has a vested interest in ensuring CHRIS is the most dynamic tool possible. Senior MEO staff, in coordination with Customer Service staff, will continually compile and internally evaluate ideas for CHRIS improvement. The MEO Team envisions CHRIS functions interwoven into virtually all of the customer service processes, Needs Assessment, and professional program development activities.

Another element in the interaction with CHRIS is related to course registration and the timeliness and quality of the data entered into the system. The Human Resources Assistants will have the responsibility, supported by periodic checks from Team Leads and Supervisors, to ensure and verify data is posted in CHRIS within the three working days standard.

PWS Section 3.3.18 requires assistance with the CHRIS modification process to include making recommendations for CHRIS training modification and performing Systems Integration Testing (SIT) when requested by the COR. The Corporate Training Officer will coordinate and make recommendations and provide oversight for SIT testing. Other staff will provide assistance for this task as shown in AT Appendix C.

3.2.4.9 Workload Drivers

Staffing was determined based on the following Customer Service workload drivers:

- Number of training instances requiring support
- Number of courses
- Number of phone calls, e-mails, and personal inquiries
- Number of communications
- Number of reports

3.2.4.10 Meeting Performance Standards

This technical approach allows the MEO to meet the various customer service performance standards, and the centralization of many of the customer service tasks will provide the MEO with greater control over the activities. Dedicated customer service staff will provide initial responses to inquiries within one hour, and will follow up with final responses within one working day as required. Records and data in CHRIS will be maintained and posted within three working days of the action, and system issues will be addressed as they arise. The Operations Centers will ensure accurate information is communicated to customers and participants are notified of course cancellations in a timely manner.

3.2.5 Subject Matter Expertise (PWS Section 3.4)

The MEO proposes the staffing detailed below to accomplish the SME requirements. Each of the locations will have staff with the skills necessary to provide SME as required in the PWS.

Table 3-7: Subject Matter Expertise Staffing

PWS Functional Area	Labor Category	Grade	Skills
3.4	Corporate Training Officer	GS-13	<ul style="list-style-type: none"> • Knowledge of curriculum development and training methods • Understanding of training policies and procedures • Ability to collect and analyze data • Ability to summarize data and provide recommendations • Understanding of workforce planning • Technical understanding of CHRIS capabilities

PWS Functional Area	Labor Category	Grade	Skills
3.4	Corporate Training Specialist	GS-12	<ul style="list-style-type: none"> • Knowledge of curriculum development and training methods • Understanding of training policies and procedures • Ability to collect and analyze data • Ability to summarize data and provide recommendations • Understanding of workforce planning
3.4	Human Resources Specialist (Liaison)	GS-12	<ul style="list-style-type: none"> • Knowledge of curriculum development and training methods • Understanding of training policies and procedures • Ability to collect and analyze data • Ability to summarize data and provide recommendations • Understanding of workforce planning
3.4	Human Resources Specialist	GS-12	<ul style="list-style-type: none"> • Knowledge of curriculum development and training methods • Understanding of training policies and procedures • Ability to collect and analyze data • Ability to summarize data and provide recommendations • Understanding of workforce planning

In accordance with PWS Sections 3.4.1 through 3.4.3, the staff identified above will provide SME on Management and Operating (M&O) and Management and Integration (M&I) training products and contractor-related training when requested by the COR. The MEO will also provide SME on training related systems and issues such as CHRIS, knowledge management, succession planning, and the DOE Corporate Business Training Plan.

The DOE Federal workforce involved in training contains a wide range of SME and the MEO will use these experts in a variety of ways. The need for these SME in the Training Support Services function can be generated by a number of actions within the training community or based on the observation and analyses of MEO staff. The Core Group will work to ensure all of its staff know when and how to tap these valuable, experienced SME resources. A set of procedures will be developed in detail after staff is chosen for the MEO. This is logical since the exact physical and organizational location of the various SME will not be known until staff is in place.

The MEO Team knows SME will be used to facilitate and clarify the content questions and issues in the needs assessment process, the assessments of courses, the technical elements in specific programs, the assessments of contractor-provided training products, and to ensure program compliance and assist in policy review and development.

3.2.5.1 Workload Drivers

Staffing was determined based on the following SME workload driver:

- Number of hours required to provide SME

3.2.5.2 Meeting Performance Standards

The technical approach allows the MEO to verify and document that M&O and M&I training materials meet all laws, regulations, and orders; use a systematic approach to training; satisfy course learning objectives; and address each criterion in needs assessment. The proposed staff will provide reports containing available information on M&O and M&I contractor-related training within three working days of COR request.

3.2.6 Employee Development (PWS Section 3.5)

The MEO proposes the staffing detailed in Table 3-8 to accomplish the employee development requirements in PWS Section 3.5. Career Development Programs will be primarily managed at the Core Group, WOC, and AOC; however, Human Resources Specialists (Liaison) will be available to provide additional assistance and administer site-specific programs.

Table 3-8: Employee Development Staffing

PWS Functional Area	Labor Category	Grade	Skills
3.5	Corporate Training Officer	GS-13	<ul style="list-style-type: none"> • Knowledge of applications in employee development • Understanding of resource management • Ability to assess program and evaluate findings • Ability to formulate recommendations and write reports
3.5	TQP Manager	GS-13	<ul style="list-style-type: none"> • Knowledge of applications in employee development • Understanding of resource management • Ability to assess program and evaluate findings • Ability to formulate recommendations and write reports • Understanding of qualification standards • Understanding of technical requirements
3.5	Corporate Training Specialist	GS-12	<ul style="list-style-type: none"> • Knowledge of applications in employee development • Understanding of resource management • Ability to assess program and evaluate findings • Ability to formulate recommendations and write reports
3.5	Human Resources Specialist (Liaison)	GS-12	<ul style="list-style-type: none"> • Knowledge of applications in employee development • Understanding of resource management • Ability to assess program and evaluate findings • Ability to formulate recommendations and write reports

PWS Functional Area	Labor Category	Grade	Skills
3.5	Human Resources Specialist	GS-12	<ul style="list-style-type: none"> • Knowledge of applications in employee development • Understanding of resource management • Ability to assess program and evaluate findings • Ability to formulate recommendations and write reports
3.5	Human Resources Specialist (TQP)	GS-12	<ul style="list-style-type: none"> • Knowledge of applications in employee development • Understanding of resource management • Ability to assess program and evaluate findings • Ability to formulate recommendations and write reports • Understanding of qualification standards • Understanding of technical requirements • Ability to develop new standards and formulate recommendations

Each of these Career Development Programs and any new Career Programs will be assigned to MEO staff. The Corporate Training Officer will manage Senior Executive Service programs; the TQP Manager and Human Resources Specialists (TQP) will manage the Technical Qualifications Program; and the Corporate Training Specialists, Human Resources Specialists, and Liaisons will administer the others in accordance with PWS Sections 3.5.1 through 3.5.2. Duties will include providing recommendations on policy, improvements, coordination, planning, resource management, needs assessment, design, delivery, and assignment of responsibilities. The MEO staff will submit to the COR improvements to existing programs at least annually. Additionally, the Corporate Training Officer will recommend new Career Development Programs if program needs are identified during the year or during the annual needs assessment process discussed above.

The staff assigned to these programs will track, monitor, and report on the status of each program and the progress of each student. This is currently done at some of the larger DOE training support services locations, but as part of the MEO, it will be performed for all of the DOE Elements. Students falling behind in the program will be contacted with an attempt to identify the problem, and to work with the individual and supervisor to determine how to help the individual successfully complete the program. In a continuation of current practices, the MEO staff will use bi-weekly teleconferences to obtain and update status information for some of the larger programs.

After a student has completed a program, the Human Resources Specialists may review evaluations to identify lessons learned and areas for improvement and share this information with the CGO.

The MEO Team realizes that the intensity of resources devoted to a career program is dependent on the newness of the program, the participants' stage in the program, the amount of financial resources made available to the program, and particular DOE Elements' emphasis on that program. The MEO staff assigned to these programs will be flexible and adjust to the DOE's priorities and the other factors impacting intensity. When specific questions arise as to the level of effort, the COR will be notified for clarification.

3.2.6.1 Workload Drivers

Staffing was determined based on the following employee development workload drivers:

- Hours required per program
- Number of programs
- Financial resources available to the specific program
- DOE-wide emphasis on a particular program

3.2.6.2 Meeting Performance Standards

The technical approach allows the MEO to ensure current and new development programs meet all laws, regulations, and orders; uses systematic approach to training; satisfies course learning objectives; and addresses each criterion in the needs assessment. MEO personnel responsible for a Career Development Programs will provide recommendations for improvements to existing programs at least annually and will submit recommendations for development of new programs as they arise or are requested by the COR.

3.2.7 Technical Qualifications Program (TQP) Support (PWS Section 3.6)

The MEO proposes the staffing detailed in Table 3-9 to accomplish the TQP Support requirements. Tasks will be performed at the Core Group, WOC, and AOC.

Table 3-9: Technical Qualification Program Support Staffing

PWS Functional Area	Labor Category	Grade	Skills
3.6	TQP Manager	GS-13	<ul style="list-style-type: none"> • Understanding of qualification standards • Understanding of technical requirements • Ability to develop new standards and formulate recommendations
3.6	Human Resources Specialist (TQP)	GS-12	<ul style="list-style-type: none"> • Understanding of qualification standards • Understanding of technical requirements • Ability to develop new standards and formulate recommendations
3.6	Human Resources Assistant	GS-07	<ul style="list-style-type: none"> • Ability to complete and maintain qualification cards

The TQP Manager from the Core Group will provide primary oversight of the TQP with assistance provided by the Human Resources Specialists (TQP) at each of the Operations Centers. The MEO views the role of the TQP Manager as comprehensive and expansive, overseeing the entire Training Support Services TQP function. The TQP administration process involves the review of new or changing positions to identify TQP objectives, as well as the administration of TQP requirements. Since recommendations for new or changing positions to participate in the TQP should come from the supervisor and human resources, the TQP Manager will maintain close contact with both parties. When new or changing positions are identified for inclusion in the TQP, a job-in-task analysis is performed to determine the required competencies. A set of qualifications standards is drafted based on the required competencies and the position descriptions. Employees may fulfill these qualification standards through training, previous experience, advanced degrees, and other applicable sources.

The TQP Manager, as well as Human Resources Specialists, may identify occupations for specific standards and work with employees and their supervisor to further determine what competencies are needed. Human Resources Specialists may assist in identifying technical courses that meet the qualification requirements and prepare organizational needs requests for the TQP. This position will serve as an advisor on the General Technical Base qualification standard and the 28 functional area qualification standards. The TQP Manager will provide recommendations for new or updated standards in accordance with PWS Section 3.6.2.

The TQP Manager will provide input to the FTCP and DOE management on issues related to maintenance and improvement of DOE technical capability. MEO staff will also track progress of the TQP by position, and will report to Headquarters and the FTCP on this progress on a quarterly basis (PWS 3.6.1). Since employees must meet the qualifications and then re-qualify every three years, the TQP Manager will ensure employees are aware of the qualification and re-qualification requirements, and appropriate training is available. As required in PWS Section 3.6.3, the Human Resources Assistants will develop and deliver a qualification card listing the required competencies to each candidate to track progress. Hard copies of these qualification cards will be maintained at the Operations Centers.

3.2.7.1 Workload Drivers

Staffing was determined based on the following TQP workload drivers:

- Number of DOE personnel involved in the TQP
- Number of locations with TQP activity

3.2.7.2 Meeting Performance Standards

The technical approach allows the MEO to provide required recommendations, reports, and other information on the TQP in accordance with the quality and timeliness standards. The Liaisons, staff at the AOC and WOC, and staff in the Core Group provide ample staffing and internal TQP-expertise to develop high quality reports whenever requested, even above the periodic reporting required by the PWS. The TQP Manager will ultimately be responsible for ensuring all of these tasks and standards are met.

3.2.8 General Requirements (PWS Sections 2.0 and 5.0)

The MEO proposes the staffing detailed in Table 3-10 to accomplish the general requirements of the PWS. These tasks will be primarily performed by staff in the Core Group; however, time is included for support at all of the locations.

Table 3-10: General Requirements Staffing

PWS Functional Area	Labor Category	Grade	Skills
2.1	Corporate Training Officer	GS-13	• Knowledge of all DOE Training Policies
2.1	Quality Control Management POC	GS-13	• Knowledge of all DOE Training Policies
2.1	Corporate Training Specialist	GS-12	• Knowledge of all DOE Training Policies

PWS Functional Area	Labor Category	Grade	Skills
2.1	Human Resources Specialist (Liaison)	GS-12	<ul style="list-style-type: none"> Ability to identify Site Specific Training Issues Knowledge of DOE Training Approaches and Resources
2.1	Human Resources Specialist	GS-12	<ul style="list-style-type: none"> Knowledge of DOE Training Approaches and Resources
5.1, 5.2	Quality Control Management POC	GS-13	<ul style="list-style-type: none"> Knowledge of QC Procedures
5.5	Project Manager	GS-14	<ul style="list-style-type: none"> Knowledge of all DOE Training Policies
5.5	Corporate Training Officer	GS-13	<ul style="list-style-type: none"> Knowledge of all DOE Training Policies
5.5	Deputy Project Manager	GS-13	<ul style="list-style-type: none"> Knowledge of all DOE Training Policies
5.5	Corporate Training Specialist	GS-12	<ul style="list-style-type: none"> Knowledge of all DOE Training Policies
5.10	Administrative Assistant	GS-07	<ul style="list-style-type: none"> Knowledge of document and file maintenance

In response to PWS Section 2.1, Human Resources Specialists at the AOC, WOC, and field sites, will serve as liaisons to Training Support Services functions for policy recommendations, required annual reports, multi-Element training, and Training Plans.

The MEO will utilize senior Human Resources Specialists at the Core Group, AOC, and WOC to meet the reporting requirements outlined in PWS Section 2.4.

In response to PWS Section 5.0, the MEO will provide specific staff hours for major activities such as quality control, meetings, and library maintenance. Core Group staff, specifically the Quality Control POC, will develop a quality control plan, manage customer complaints and feedback, and identify and correct any process or product that does not meet the quality and timeliness standards in the PRS. Meetings with senior staff and the maintenance of the training report library are other activities that are staffed for in the MEO.

3.2.8.1 Workload Drivers

Staffing was determined based on the following general workload drivers:

- Number of DOE Elements
- Number of recommendations
- Number of reporting requirements

3.2.8.2 Meeting Performance Standards

To meet the quality standard for policy recommendations, all written recommendations will be thoroughly edited and reviewed by multiple, knowledgeable senior staff before presentation to the COR. For the DOE Annual Training Plan and required training reports, the components will first be reviewed by senior staff, and then the entire product will be reviewed by a variety of staff with specific service delivery and content expertise.

3.2.9 Supervision and Indirect PWS Activities

The MEO proposes the staffing detailed in Table 3-11 to accomplish the supervision, management, oversight, and indirect labor requirements. While supervision and indirect activities are not spelled out in the PWS, they, of course, are essential to the MEO's functioning as a progressive, successful, and well-run organization. Hence, considerable hours and staff have been built in the overall staffing of the MEO to focus on management and indirect activities. These tasks will be performed by staff in the Core Group and the Deputy Project Manager and Team Lead at each Operations Center.

Table 3-11: Supervision and Indirect PWS Activities Staffing

Labor Category	Grade	Skills	FTE
Project Manager	GS-14	<ul style="list-style-type: none"> See PWS 4.1.2 	0.949
Quality Control Management POC	GS-13	<ul style="list-style-type: none"> See PWS 4.1.3 	0.259
Corporate Training Officer	GS-13	<ul style="list-style-type: none"> See PWS 4.1.4.1 	0.006
Corporate Training Specialist	GS-12	<ul style="list-style-type: none"> See PWS 4.1.4.2 	0.152
TQP Manager	GS-13	<ul style="list-style-type: none"> See PWS 4.4.1.3 	0.110
Deputy Project Manager	GS-13	<ul style="list-style-type: none"> Knowledge of all DOE Training Policies 	1.946
Human Resources Specialist (Team Lead)	GS-09/11	<ul style="list-style-type: none"> Knowledge of training support service functions 	1.767
Administrative Assistant	GS-07	<ul style="list-style-type: none"> General clerical and administrative skills Knowledge of document and file maintenance 	0.932
General Clerk	GS-05	<ul style="list-style-type: none"> General clerical and administrative skills 	0.608
SUPERVISION AND INDIRECT TOTAL FTE			6.729

4 EVALUATION FACTOR THREE - PHASE-IN PLAN

4.1 INTRODUCTION

The solicitation requires a 120 calendar day Phase-In Period prior to the start of the first full performance period. The Phase-In Plan, outlined below, is designed to ensure that the DOE Training Support Services function maintains continuity of operations during the phase-in period and positions itself to meet or exceed all performance standards and workload demands in the first full performance period. The objective of this Phase-in Plan is to outline and direct a smooth and seamless transition between the current organization and the MEO. This section provides an integrated Phase-In Plan and schedule for the successful implementation of the MEO. The schedule also shows phase-in activities that may not be completed within the time period stated in the PWS. The MEO Team realizes the initial success of the MEO depends on a well thought out and detailed Phase-In Plan.

The solicitation requires a two part phase-in: Phase I – Start up, and Phase II –Testing and Reviews. Phase I will include preparation of activities, establishing an infrastructure to perform the work, ensuring a qualified workforce is in place, providing appropriate training, and implementing any necessary support to perform the requirements in the PWS. Phase II will include systems testing, inventories, and review of the Quality Control Plan. Each Phase is expected to last 60 calendar days, which will meet the requirement of the 120 calendar day phase-in period. Both phases will include progress meetings at least every 30 calendar days, following the initial meeting within the first 10 calendar days after award. If requested by the COR, additional progress meetings will be held. Specific tasks of these two phases are discussed in further detail herein.

A detailed breakdown of staff hours for activities and training during the Phase-In Period is provided in AT Appendix I.

4.2 CONTINUITY OF OPERATIONS

The success of the Training Support Services function is highly dependent on its ability to deliver timely services to customers. Maintaining a continuity of operations is essential to having a successful transition to the MEO and maintaining already established customer relations and processes. There are many outside organizations dependent on the Training Support Services function; therefore, the transition from existing to new operations must be seamless.

The MEO has the advantage of already understanding the processes, facilities, environment, and CHRIS, as well as being able to utilize a large current pool of knowledgeable personnel to transition into the new organization. Retaining current personnel as part of the new organization will help to ensure customer service does not decrease during this phase-in period, and beyond into the full performance periods. This internal knowledge and experience will also be beneficial in maintaining seamless interactions with the existing contractors performing training related services.

Furthermore, the phase-in will be made simpler because existing technology (namely, CHRIS) will be the basic tools of the MEO staff. The need to introduce new technological tools has the potential to make the phase-in more complex and problematic. Many of the current staff have already received training in CHRIS, and those needing additional training in CHRIS have a wealth of staff knowledge to utilize. To further supplement this vital element of operations, CHRIS training is an integral part of the phase-in period for many staff.

Maintaining close coordination with the CGO is essential to clarifying issues that may arise during the transition. The MEO will work directly with the CGO during the phase-in period to further ensure the continuity of operations. Senior MEO leadership will be responsible for informing customers of who has responsibility for their geographic location during the phase-in period. To meet this need, the MEO will identify and maintain a list of key personnel and location specific contacts. These contacts will be important for managing local logistics and will help contribute to the smooth transition.

During the phase-in period, the MEO is required to, and will, fulfill all contractual requirements as specified in the solicitation, such as completing reports and providing appropriate security clearances and documentation, but is not required to meet task performance standards until the start date. Key milestones to the MEO becoming fully operational are identified below.

4.3 KEY PHASE-IN MILESTONES

There are a number of specific tasks and dates that must be met throughout the 120 day phase-in period. The MEO plans to keep the Government informed of ongoing activities at the regularly scheduled progress meetings, and on an as-needed basis if important issues arise. All required documents and reports will be provided to the Contracting Officer by the date requested. The table below provides key milestones before and during the phase-in period. (All dates are estimates and will be updated upon final decision.) [This table will be updated in the near future.]

Table 4-1: Key Phase-In Milestones

Task Name	Start	Finish
Performance Decision	8/20/2004	8/20/2004
Directly Interested Party Review Period	8/20/2004	8/30/2004
Contest Process (If Required)	TBD	TBD
GAO Protest Process (If Required)	TBD	TBD
Final Decision	9/1/2004	9/1/2004
Kickoff & Initial Progress Meeting	9/10/2004	9/10/2004
Letter of Obligation	10/1/2004	10/1/2004
MEO Phase-in Period	10/1/2004	1/31/2005
Verify Availability of Space	10/05/2004	10/15/2004
Inventory of Property	10/11/2004	10/20/2004
Staff Training	11/01/2004	01/31/2005
Letter of Obligation Start Date	2/1/2005	2/1/2005

4.4 PHASE-IN ACTIVITIES

A comprehensive list of phase-in activities is shown in Table 3-2. The Phase-In Team will enter the start date and completion date upon receipt of the Letter of Obligation. The Phase-In Team will also supplement the table with new tasks and subtasks as deemed necessary

by the proponent for the task. The MEO Team recognizes that the following schedule deviates from the Solicitation and PWS tasks for Phase I and Phase II; however, based on experience, Government hiring procedures, and logistics, the following schedule has been proposed.

Table 4-2: Phase-In Activities in 30 Day Increments from Activity Start Date
**N=Phase-In Period start date (i.e., date of award of the Letter of Obligation)*

Task No.	Required Task	Task Start Date*	Task Completion Date*
FIRST PERIOD – DAYS 1-30			
1	Discuss and determine whether joint MEO senior management/CGO Phase-In Team will be developed.	N	N+10
2	Finalize, at the direction and discretion of the CGO, a joint Phase-In Team and appoint Phase-In Team Leader.	N+10	N+15
3	Plan, coordinate, and conduct Phase-In Team meetings.	N	N+120
4	Prepare and distribute agenda and memorandum for record of meetings to each member via e-mail.	N	N+120
5	Ensure tasks assigned to team members/activities are completed in a timely manner as not to delay the phase-in schedule.	N	N+120
6	Plan, coordinate, and conduct status meetings at least every 30 calendar days. All MEO staff participate in these status and progress meetings.	N	N+120
7	Prepare agenda and briefing charts.	N+15	N+120
8	Coordinate and collect detailed input into the Phase-in Plan from Team members.	N	N+120
9	Update plan and milestone progress, keeping all team members informed.	N	N+120
10	Post open positions, if required.	N	N+60
11	Interview candidates, if required.	N	N+80
12	Hire personnel as necessary.	N	N+100
13	Review requirements for performance as specified in the Letter of Obligation.	N	N+120
14	Transition work from the current organization to the MEO.	N	N+120
15	Develop/refine operating practices and procedures.	N	N+120
SECOND PERIOD – DAYS 31-60			
16	Coordinate with security and other location-specific activities as necessary.	N+30	N+120
17	Train personnel as necessary.	N+30	Ongoing
18	Perform MEO and CGO joint inventory of property.	N+45	N+90
THIRD AND FOURTH PERIODS – DAYS 61-120			
19	Provide information and documents to DOE MEO team to ensure that the MEO is able to function effectively at the commencement of the first performance period.	N+60	N+120
20	Collect “lessons learned” as phase-in progresses.	N+60	N+120
21	Begin movement and occupation of space by MEO.	N+60	N+120
22	Coordinate with the HRA the establishment of MEO in the DOE personnel system.	N+60	N+120

Task No.	Required Task	Task Start Date*	Task Completion Date*
23	Coordinate systems issues related to MEO staff.	N+60	N+120

4.4.1 Phase-In Team

The MEO plans to create a Phase-In Team of its senior staff to conduct the activities associated with the transition from current operations. The Phase-In Team will manage the changes during the phase-in period and implement the MEO while ensuring continuity of operations.

4.5 FUNCTIONS BY LOCATION

During the phase-in period, DOE Training Support Services staff at each of the current locations will continue to render services. There will be two main locations coordinating the Training Support Services effort, which are Headquarters in Washington, D.C., and Albuquerque, NM. These two locations will stagger operation times to ensure full operation and availability to customers during the specified hours. The other locations where services will be performed include Chicago, Idaho, Oak Ridge, Richland, and Savannah River.

The Phase-In Team will coordinate with contacts at each location and DOE management to ensure that workload is transferred to the respective MEO location by start of the first performance period.

4.6 FACILITIES, PROPERTY, AND SUPPORT PLANNING

The Phase-In Team will develop plans to safeguard sensitive DOE Training Support Services information, and safeguard office equipment and computers. The MEO will utilize existing and provided DOE facilities and equipment at the locations identified. The majority of files and records at each current location will not be moved, but rather archived at their current location.

Logistical coordination will take place as the phase-in period progresses. This will address physical moves, the availability and suitability of space at each of the locations where staff will be present (e.g., Washington, Albuquerque, Chicago, Idaho, Oak Ridge, Savannah River, and Richland). The Deputy Project Managers will take the lead on these issues, assisted by other on-board staff.

4.7 PERSONNEL MANAGEMENT AND STAFFING

All MEO locations and groups will be staffed with highly skilled, dedicated Federal employees. Existing human resources offices in the geographic location of MEO offices will provide HR support. The MEO will transition so as to assume full staffing at the performance period start date. The MEO plans to maximize use of the current organization's employees. The MEO's access to an employment-ready workforce presents much less risk than that of a private bidder who may have to assemble staffing often from scratch. The MEO will take a proactive approach to retain experienced and knowledgeable personnel by providing up to date information and addressing concerns.

4.7.1 Addressing Employee Concerns

Current DOE Training Support Services personnel will be impacted by the implementation of the MEO. As has been the case in other studies, it is envisioned that an employee concerns resolution program will be established in coordination with the Human Resources Advisor (HRA) and the Office of Competitive Sourcing. If the CGO chooses this transition approach, a representative from the MEO will be an active point person in addressing employee concerns. Issues relating to compensation and placement procedures will not be handled by the MEO, and is in the purview of the CGO, specifically human resources.

Regardless of the choice of the CGO regarding a joint team approach, representatives from the MEO will begin to communicate in person, via e-mail, and via videoconference with potential MEO employees. Dates of transition, locations, and changes to responsibilities will be major topics, among many others. Additionally, the MEO's phase-in leaders will conduct employee briefing session to keep incumbents of the current organization informed of the status of the transition.

A team comprised of representative of the HRA and senior MEO management will conduct site visits after the Service Provider selection has been announced. The purpose of these visits will be to meet with affected employees, management officials, and other applicable individuals to conduct briefings and presentations regarding impacts of the A-76 process. The schedule of visits will be determined after award.

4.7.2 Labor-Management Relations

The MEO's Phase-In Team will coordinate Labor-Management Relations (LMR) issues with the HRA. Collective Bargaining Agreements will be honored, and impact and implementation bargaining will be conducted in accordance with provisions of existing Collective Bargaining Agreements. The HRA will advise and assist local human resources offices regarding pertinent issues and activities.

4.7.3 Retention and Promotion Issues

This is another area of the MEO bid where the creation of the Agency Tender presents different challenges and warrants different approaches. First, the MEO Team has incorporated certain positions that contain career ladders, including the Human Resources Specialist 9/11 position in the Operations Centers. These are costed within the Agency Cost Estimate.

Second, because of the range of grades and types of positions at the Operations Centers and at the Core Group, a certain opportunity exists for advancement for individuals within the MEO.

Close coordination with the HRA will be essential given the many variables that will come into play in terms of placing specific personnel into new MEO positions.

4.7.4 Relocations

No relocations were assumed in establishing the MEO.

4.7.5 Interviewing and Hiring

The MEO is obligated, as an entity consisting of Government employees, to comply with all Federal regulations, including those issued by DOE, OPM, and OMB for all interviewing and hiring.

The MEO Team foresees a minimal need to hire additional Federal employees to staff the MEO. The current pool of qualified, experienced personnel within the DOE Training Support Services function will satisfy most of the staffing requirements of the MEO. When hiring is required, it is envisioned that the Deputy Project Managers and the Project Manager will be involved.

Senior MEO representatives will work closely with human resource professionals responsible for Government hiring in all cases where a personnel or skill gap is identified and hiring is required.

4.7.6 Training

Training of the MEO staff is a vital element of this MEO. Due to the continued evolution of CHRIS, the MEO will embark on specific training for multiple staff skill levels. All MEO personnel will be proficiently trained in CHRIS and its interfaces. Federal MEO staff, as part of the incumbent organization, will be available for training anytime during the phase-in period. Select staff and supervisors will be trained during the phase-in period and these functional experts will subsequently provide CHRIS training sessions to MEO staff. In addition to formal training sessions, time will be budgeted during the phase-in period for supervisors to provide staff with on-the-job CHRIS training. The tables provided in Appendix I show a detailed phase-in training schedule.

Additionally, all employees will be trained on the new organization and how it functions, including changes in operating procedures, new steps in the process, and interactions with customers. This training will take place during the phase-in period. As needed, information will be provided to customers to inform them on changes to the process.

Training costs have been figured into the Agency Cost Estimate for the MEO.

4.8 DEVELOPMENT OF OPERATING PRACTICES AND PROCEDURES

MEO staff has significant experience performing the tasks identified in the PWS. While these tasks stay the same in the MEO, some operating practices and procedures will necessarily change for some locations. Staff will gain proficiency in performing these new processes by the start date, with training continuing during the first performance period. A timetable for first performance period training will be developed depending on the extent of phase-in training on any new procedures.

The Deputy Project Manager, Human Resources Training Specialist, and other staff will develop policies during phase-in relating to specific operating procedures. Any new procedures will be developed into new standard operating procedures for staff and become operational soon after the staff is on-board. Specific staff training in procedures has been built into the phase-in period and will continue into the first full performance period.

4.9 INTERNAL SUPPORT OPERATIONS

The MEO Team anticipates that all current internal support operations such as payroll, Human Resources, and facility support will continue without interruption during the phase-in period as these functions fall outside the scope of this Circular A-76 Standard Competition.

4.10 ACTIVITIES EXTENDING BEYOND THE PHASE-IN PERIOD

The MEO Team expects certain training activities to continue after the phase-in period. CHRIS training and operating procedure training may be required periodically during the out-

years of this LOO. The MEO has included annual training hours for the staff to accomplish these requirements.

Because of the number of affected positions, it is probable that certain hiring and transfer decisions may extend into the first performance period. The Deputy Project Managers and the Project Manager will work closely with DOE Human Resources on filling all MEO positions which may remain after the LOO start date.

4.11 TRACKING PHASE-IN PROGRESS AND SUCCESS

Successful implementation of the MEO is dependent on the timely execution of all activities detailed in this Phase-In Plan. To this end, the Phase-In Team will convene regularly with representatives from the CGO to discuss phase-in progress, identify and address any unanticipated hindrances, and reaffirm the timeline for completing unaccomplished tasks.

4.11.1 Indicators of Success

The following indicators will be used by the Phase-In Team to determine how well Phase-In Plan elements were implemented:

- Did the phase-in of the MEO occur without degradation to the mission or loss of daily operational performance, notwithstanding changes to position grades, overall staffing, and new lines of responsibility?
- Has customer satisfaction been maintained or improved? Has customer contact been maintained on a regular basis?
- Was the initial disruption of the workplace kept to a minimum and eliminated in a reasonable amount of time? Were personnel issues resolved?
- Has the implementation of the MEO been accomplished according to schedule?
- Was MEO work output at or above the quality standards specified in the PWS at initiation of the first performance period?
- Did the MEO fully comply with the PWS requirements at initiation of the first performance period?

4.12 PHASE-IN PLAN CONCLUSION

The goal of this Phase-in Plan is to ensure a seamless transition to the MEO. Careful attention was paid to address all key factors and activities that will affect the ability of the DOE Training Support Services function to render high quality, consistent, and timely services during a period of significant staff uncertainty and organizational transformation. Following this plan will help ensure both continuity of operations during the phase-in period and compliance with all PWS performance standards at initiation of this LOO.

5 EVALUATION FACTOR FOUR - QUALITY CONTROL/CUSTOMER SATISFACTION PLAN

5.1 INTRODUCTION

The Quality Control/Customer Satisfaction Plan is a required element of the Agency Tender, and is designed to ensure quality of work and customer satisfaction. This Plan is prevention-based and outlines a proactive approach to quality work and customer satisfaction. The Plan put forth in the following pages outlines the MEO's approach to ensuring all performance standards and requirements listed in PWS Appendix F (Performance Requirements Summary) are met or exceeded.

In order to ensure the quality of the products and services provided by the MEO, a Quality Control Management POC will be designated and will oversee the MEO's quality control activities throughout the term of the Letter of Obligation.

Quality will be checked, verified, enforced, and expected at all locations where training services are provided. The MEO will work to ensure universal quality levels at all locations and for all customers using the Performance Requirements Summary as a guide.

The MEO Team is aware that supervisors, human resources staff, as well as DOE staff themselves count on training data and records being accurate and thorough. The MEO is structured to satisfy this diverse group of customers and users of training information.

5.2 INTERNAL MANAGEMENT CONTROLS

Specific quality assurance and quality control responsibilities are written into the job descriptions of all Team Leads, Deputy Project Managers, Project Manager, and Corporate Training Specialist of the organization. Additionally, the quality function will be an important attribute to be considered during the preparation of all employee performance standards and appraisals. All members of the organization will actively participate in continuous quality improvements as a matter of doing business. Employees and supervisors will systematically use the quality impact points in Section 4.4.4 to periodically monitor performance measures. Below is a summary of the orientation of different segments of the MEO.

5.2.1 Employees

Individual employees performing Training Support Services in the MEO are the first and most important level of quality control for the Organization. These positions have the ability to inspect their own work based on their experiences and grade levels. All employees will be trained in the relevant parts of the Quality Control Plan. The employees will be versed in proper procedures and well versed in the "Quality Impact Points." Quality Impact Points are discussed in more detail later in the section.

5.2.2 Supervisors/Managers

Team Leads, Deputy Project Managers, and Project Manager provide another level of quality control, with specific responsibilities for setting and maintaining the quality of work. As with employees, senior MEO staff will be trained in all aspects of the Quality Control Plan relevant to their supervision, and will be responsible for executing the Plan to achieve performance, timeliness, and quality standards contained in the PWS. Many of the supervisors/managers will be the authors and trainers of proper

operational procedures. Hence, they will know all of the areas of the processes where quality could become an issue. In addition to being the authors in many cases, all supervisors and managers will be trained in operating procedures.

5.3 QUALITY CONTROL APPROACH

The MEO is designed to provide a comprehensive approach to ensure quality is taken into account at all levels of the organization and integrated throughout the training support services function. The approach taken by the MEO includes expecting quality individual performance, supervisory oversight, and use of a specific quality control position (a senior Quality Control Management POC). Quality is a function of experience and organizational knowledge, which the MEO has developed.

5.3.1 Quality Control System

Firm measures will be in place to ensure all functions within the Training Function will be accomplished with an emphasis on quality.

In the event that deficiencies or insufficient performance is identified, the MEO will provide corrective action. Resolving deficiencies will focus on correcting the root cause of the problem, and identifying any and all issues with core data and training information (i.e., registration information, specific records, and course information) rather than treating the deficiency symptomatically. Corrective action is a remedial response to an unacceptable level of performance. Appropriate corrective action measures address the root cause of the deficiency, thereby helping to ensure the deficiency does not reoccur. All corrective action measures will follow a documented process consisting of the following steps:

- **Documenting the nature of the problem**, including time of occurrence/identification and detailed description of occurrence. This will be a Team Lead, Deputy Project Managers, Project Manager, and Corporate Training Specialist responsibility and has been built into their respective responsibilities.
- **Investigating and analyzing the situation** to determine the root cause of the problem, as well as changes required to prevent recurrence of the problem in the future. This analysis will be completed within an appropriate time frame depending on the nature of the problem.
- **Documenting steps required to remedy the problem**, including target date for completion. Immediate resolution will be the aim wherever possible. The Team Lead, Deputy Project Managers, Project Manager, and Corporate Training Specialist will monitor progress and interact with customers to ensure that a sufficient outcome is obtained.
- **Following up to confirm that the corrective action has been effective.** This follow-up will take place approximately 15 working days after the initial problem, or earlier if required, depending on the nature of the problem. If the corrective action has not been effective, then a new corrective action will be established and executed. The Team Lead, Deputy Project Managers, Project Manager, and Corporate Training Specialist have responsibility for this follow-up.
- **Maintaining all documentation** by the Project Manager, Deputy Project Managers, Quality Control Management POC, and Corporate Training Specialist in the MEO's files as "lessons learned" for future reference. In general, the MEO will maintain a file of all inspections or samplings conducted by the MEO, the results, deficiencies, and any corrective actions taken.

All staff discovering sub-standard or incorrect work during reviews of work will take action to ensure the problem does not continue. Preventive measures may include re-doing the work and re-training employees for proper technique to prevent future errors and maintain high quality work. For errors discovered in completed work, corrective measures will be taken, including re-doing the work (i.e., correcting source data), contacting affected customers as applicable, re-training the employee for proper technique, reiterating the quality standard, and if necessary, increasing the inspection of the that task to ensure standards are being met.

5.3.2 Quality Control Human Resources

The Quality Control Management POC, a required position in the group of Key Personnel, will provide the oversight of the Organization's quality control activities. This position will not only interface with Quality Assurance (QA) positions outside the MEO, but will also ensure all locations are maintaining the same quality and timeliness standards. While there will be one primary Quality Control Management POC, designated alternates (Managers and Supervisors) will be able to serve in this position as needed.

The Quality Control Management POC will track the quality of work at each location, including noting deficiencies and corrective actions. While each Manager and Supervisor will be responsible for the quality of the work performed by their employees and individual organizations, the Quality Control Management POC will be responsible for the overall work quality of the MEO.

5.3.3 Compliance with Directives and Publications

As with all tasks in the PWS, the MEO will provide all services and products in accordance with the applicable directives and publications. The Project Manager, Deputy Project Managers, and the Quality Control Management POC will be responsible for ensuring tasks follow these directives, while also ensuring they meet the performance standards. DOE Manual 360.1B, DOE Manual 360.1-1B, DOE M 426.1, DOE Order 470.1, and DOE Handbook 1078-94 will serve as guiding documents to ensure quality performance.

5.3.4 Compliance with the PWS Requirements

This Plan will ensure accomplishment of each element in the PWS, particularly the Performance Requirements Summary (PRS) in Appendix F, which outlines the quality and timeliness standards for tasks and services required of the MEO.

5.4 CUSTOMER SATISFACTION

Customer satisfaction is pertinent to maintaining a successful and quality training program, and the quality of work of the MEO is dependent on the data received from customers. The MEO will have significant interactions with customers, which include individuals both internal and external to the MEO at Headquarters and Field Offices. The informal and formal input and feedback of customers will be important in measuring the quality of the services provided. The MEO is aware that the timeliness and accuracy of its interactions with customers will serve as the measures that DOE Elements and their respective staffs will use to judge the MEO.

5.4.1 Customer Communication and Feedback

The MEO will maintain a customer comment and complaint program and processing system, which will allow for identification and correction of validated customer complaints.

Suggestions and complaints received informally or formally by telephone, e-mail, in-person, or direct survey will be reviewed and evaluated. Suggestions will be evaluated and possible resulting changes will be discussed among all MEO staff.

In the event of validated complaints, the Organization will take action to correct the incident, and also provide feedback to both the Government and customers on corrective actions taken.

5.4.2 Tracking of Customer Complaints

The MEO will follow the following process for handling customer comments and complaints:

- Upon receipt of customer comments or complaints, the matter will be immediately brought to the attention of the responsible Team Lead or other senior staff. In addition, the Team Lead will contact the customer immediately should the comment or complaint warrant, obtain additional information necessary to define the problem, and provide reassurance that prompt remedial action will be taken.
- The Team Lead or senior staff will make the Deputy Project Manager and Quality Control Management POC aware of the comment or complaint if the seriousness of the comment or complaint warrants. Determination if a complaint is a one-time event or a systemic issue will occur at this stage. This is an essential step for making resource decisions, which may be driven by the need for process changes throughout the MEO.
- No later than five working days after action has been completed to resolve the comment or complaint, the Team Lead will personally follow up with the complainant to ensure they were satisfied with the response.

This plan of action to resolve and track comments and complaints ensures immediate attention to the potential problem or improvement, and provides direct feedback and response to the customer. Maintaining positive customer relations is a pre-requisite for the success of the MEO.

5.4.3 Measuring Customer Satisfaction

The MEO plans to take a proactive approach to customer satisfaction. The MEO will take appropriate actions to be aware of potential problems, complaints, and suggestions to improve the level of service provided. These actions will include customer surveys, both formal and informal. One way to obtain this information is through the Customer Service tasks outlined in the PWS, such as fielding phone calls and registering students. This one-on-one interaction is the ideal time to solicit input from customers. Human Resources Assistants will ask each caller selected questions as provided by the Quality Control Management POC. Answers and feedback gathered in this process will be provided to Supervisors and Managers. Changes resulting from these surveys would be coordinated through the Quality Control Management POC.

As a supplement to surveys, Team Leads and Deputy Project Managers will periodically review this feedback along with proactively contacting customers to gain an in-depth understanding of their issues and changing needs.

5.4.4 Quality Impact Points

As mentioned earlier, understanding where mistakes, errors, and inaccuracies can occur better allows employees to self-monitor and supervisors to be proactive in quality control.

The list below will be shared and expanded upon and serve as a guide to exactly what segments of processes, what data, and what issues warrant the closest looks and reviews.

- All Needs Assessment data received from Elements
- IDPs and their content, coding, and categorization
- Course offering documentation
- Course curriculum content and completeness
- Content of course evaluation forms
- Class schedules, rosters, and enrollment data completeness
- Registration data including names, authorizations, locations, etc.
- Content of information transmitted to customers on classes
- Report output relating to classes, Elements, and participants
- Clearance requirements matching clearance levels of participants
- Training file accuracy
- Employee Development participant information

5.4.5 Quality Control and Customer Satisfaction Conclusion

The approach taken by the MEO is thorough and meets the requirements set forth in Section L of the solicitation. It contains a standard and accepted methodology for quality control and customer satisfaction identification and resolution of problems. The approach is supplemented in numerous areas with proactive steps to query customers before issues arise, as well as proactive steps to reach directors and decision makers outside of the MEO to understand their potential issues before they emerge as problems. The MEO Team realizes that these steps are what many customers will measure the success or failure of the MEO on.

It is important to emphasize that the staffing itself of the MEO creates an intense focus on quality. From the Quality Control Management POC through the Team Leads, ensuring the accuracy, timeliness, and thoroughness of the work is always a primary activity, if not the primary responsibility of these positions located at the AOC, the WOC, and the Core Group.

6 QUALIFIERS AND ASSUMPTIONS

6.1 PERSONNEL AND ADHERENCE TO OMB CIRCULAR NUMBER A-76 (REVISED MAY 29, 2003)

The AT intends to comply with all OPM, OMB, and DOE Personnel policies including, but not limited to, restrictions on grading and appropriate activities for staff. As required by OMB Circular A-76, the AT's FTE staff calculations are determined by dividing required hours by 1776. Calculations for FTEs put forth by non-Governmental bidders will be different.

Grades of staff in the MEO were determined based on OPM standards, and the review and approval of the DOE's Human Resources Advisor.

As dictated by OPM and DOE rules and regulations, specific staff are not, and cannot be, identified by name. All civil service entitlements and placement procedures apply. Consequently, the AT cannot identify specific individuals since the scope and depth of personnel actions cannot be determined at this point, and many personnel actions cannot commence until a final decision is reached on this competition.

6.2 TECHNOLOGICAL ASSUMPTIONS

The MEO Team has built the MEO based on the current stated functionality of CHRIS. This includes the ability to obtain and query a wide range of IDP data for use in the development of the Needs Assessments.

The MEO Team also assumes that customers will have the ability to access and provide essential registration information through CHRIS.

The MEO Team assumes Albuquerque and Savannah River are transitioning to CHRIS from the POWER system currently in place. This transition will require training, which will result in a period of time for the staff to adjust and become familiar with the system. The PWS is specific in pointing out that only CHRIS will be supported. This may have costing impacts if full training is not Government-provided or if multiple training information systems are used.

6.3 COMPLIANCE WITH DOE REGULATIONS REGARDING THE DEVELOPMENT OF IDP

The MEO cannot compel non-Training Support Services Organizations to comply with DOE regulations. As found during the workload analysis, staff participation in the IDP process is particularly low at certain locations. While this does not mean a Needs Assessment cannot be performed, it does impact the ability of the MEO staff to gather course and training information. Consequently, the MEO plans to work with DOE management throughout the process to ensure quality Needs Assessments.

6.4 WORKLOAD

The MEO Team assumes the workload provided in the PWS is accurate and is a reasonable representation of the level of effort the MEO is expected to provide. Significant variations or changes to the workload to account for included Contractor workload may result in more than a marginal change in staffing.

6.5 CUSTOMER AND DOE ELEMENT CULTURAL CHANGES

The MEO Team assumes DOE Elements and customers will accept the MEO as the DOE preferred approach to training support services. The MEO Team recognizes the implementation of the MEO may result in cultural and process changes for customers and Elements; however, the MEO Team assumes DOE will require cooperation from the Elements.

7 CONCLUSION

The proposed MEO was developed based on a thorough knowledge and understanding of training support services, with adequate staffing to meet the requirements outlined in the solicitation. The MEO Team has taken an approach that allocated personnel to locations with major workload requirements, a significant number of courses offered, or a large number of customers. Through centralized Operations Centers, customers will receive outstanding and consistent service and information from knowledgeable staff.

The supervisory structure of the Organization is designed to eliminate unnecessary overhead, and create a productive and service- and product-oriented organization. The MEO Team recognized the need and requirements to maintain high-level senior staff at the DOE Headquarters location, but also recognized the need to maintain on-site contact and interaction with customers.

The MEO Team carefully analyzed the processes currently in place that provide training support services and used those to develop the most efficient and effective approach to meet the requirements. Using the requirements of the PWS and the quality and timeliness standards of the PRS, the MEO Team identified those tasks that were time-intensive or required short response times and appropriately assigned staff hours. Every task in the PWS was addressed individually and staffed to meet the requirements.

Throughout the process of developing the Organization, the MEO Team acknowledged the need to maintain high quality products and services for DOE. The proposed Quality Control Plan is a proactive approach to not only meeting the quality standards, but identifying areas of possible improvement before there is a problem. Designated personnel will oversee the quality of the Organization; however, every employee will be involved in maintaining the quality of products and services.

Overall, the MEO Team believes this AT has the following key winning factors:

- Expertise is already available to do the work in the PWS.
- An in-depth knowledge and familiarity with related initiatives within the Department allows for a more holistic approach to training.
- An organization that will not only facilitate solutions to existing weaknesses but will facilitate improvements heretofore only imagined.
- A serious and analytical approach to understanding the Solicitation and determining the best staffing, processes, and structure.
- An efficient and effective means of accomplishing the required work at or above the expected levels.

The MEO will be made up of knowledgeable and experienced personnel, able to take on the responsibilities of this Organization. As the incumbent, the MEO has a familiarity with DOE and Training that is unique and unmatched. Furthermore, with this experience and current situation, transitioning to the MEO will require minimal effort or disruption for customers.

The MEO Team believes this is the best and most efficient organization to meet the needs of DOE, not only today, but in the future years of this LOO.

8 BONUS EVALUATION FACTOR – PROPOSED ENHANCEMENTS

Enhancement 01: Training Support Services Information Manager

Summary

CHRIS is the system identified for use in the solicitation and is an integral part of many services the MEO will provide. The MEO Team recognizes a need for the Training Support Services Organization to have representatives available to coordinate CHRIS issues and improvements and to communicate system capabilities. To meet this need, the MEO Team proposes the addition of two full-time GS-201-12 Human Resources Specialists (Information Managers) to improve the use of CHRIS on a continuous, systematic basis. The acronym “CHRIS” refers to the full suite of systems including Workflow, Employee Self Service (ESS) and DOE Info. The Information Managers will serve as principal coordinators and system managers for CHRIS and will be responsible for its effective integration as a tool for improving personnel development and training department-wide.

The MEO Team believes having these positions at the Operations Centers will provide direct insight into the day-to-day CHRIS issues and how staff and clients are best served by this system. This will allow for identification of potential efficiencies and improvements and ways of better utilizing the existing system capabilities. Furthermore, by including one Information Manager at each of Operations Centers, the enhanced MEO will not only meet the requirements of the PWS to provide customer service during work hours from 8:00 a.m. to 8:00 p.m. Eastern Standard Time, but will exceed the minimum requirements by providing this specialized expertise during the full time period.

The Information Managers will work with the training community to ensure best utilization of current CHRIS capabilities; identify and integrate additional information sources with CHRIS; and define specific enhancements to CHRIS for future information processing, information management, and reporting. The Information Managers will coordinate and compare ideas, issues, and suggestions to and from each of the Operations Centers, prioritize CHRIS modification requests and recommendations impacting the training support services area, and provide one voice from the training support services function to the CHRIS technical staff. Presentation of DOE training community needs to CHRIS technical staff will be clear, consolidated, thoughtful and mindful of CHRIS’ capabilities and limitations. When CHRIS modifications or enhancements are made, the Information Managers will coordinate testing to minimize risk and ensure efficiencies and economies in making the changes operational.

These positions require complete knowledge of CHRIS purposes and operations, training business management, performance objectives and measures, Departmental and local training and development programs, and workforce requirements. A unique aspect of the MEO is that this skill base already exists both within the Albuquerque and Washington Federal training communities. This knowledge and skill base will be leveraged and improved upon by working with the training community at the Operations Centers, Liaison sites, and Core Group and with the CHRIS technical experts on actual improvement projects. The Information Managers will also have skills in project planning, team leadership, systems analysis, and communication. This mixture of knowledge and skill will enable the Information Managers to work with the training community at the Operations Centers, Liaison sites, and the Core Group, and with CHRIS technical experts to convert proposed enhancements into actual system and behavior changes at the operational level. Information Managers will also have skills in Microsoft Office Suite programs to retrieve, format, and analyze data, and design and produce information reports for training staff and employees.

The Information Managers will integrate current and future capabilities of CHRIS information processing, management, and reporting capabilities with training support services. Currently, there are many training needs assessment, customer service, planning, and training delivery information needs that are not fully met by CHRIS. Therefore, the Information Managers will identify and integrate additional information sources to improve training services. The Information Managers will work with the training community to ensure the best utilization of current capabilities, and to define specifically the enhancements needed in CHRIS while testing enhancements to minimize risk and ensure efficiencies and economies in making changes operational.

Enhancement Factors

1. Specific Processes to be Improved.

The Information Managers will improve and enhance numerous aspects of the required products and services of the Training Support Services Organization because CHRIS is an integral part of many of the Organization's processes. From preparing the Annual Training Plan to evaluating courses, CHRIS is the system used to receive and process data. The following are the specific areas that would be enhanced by the implementation of these positions.

- PWS Section 2.1.2 (Policy Recommendations)
- PWS Section 2.3 (Information Management)
- PWS Section 2.4 (Reporting Requirements)
- PWS Section 3.1 (Needs Assessment)
- PWS Section 3.2 (Evaluation)
- PWS Section 3.3 (Customer Service)
- PWS Section 3.3.18 (Recommending CHRIS Modifications)

2. How the Processes will be Improved

Policy Recommendations

The Information Managers will provide key technical insight toward development of Policy Recommendations (2.1.2). Multiple positions within the Training Support Services Organization contribute to policy recommendations, but the Information Managers will interact daily with staff and customers. Since the Information Managers are responsible for consolidation and prioritization of the needs of the Training Support Services Organization, and interact with CHRIS technical staff regarding training needs, they can effectively identify recommendations and suggestions for improvement of the training organization.

Information Management

The Information Managers will ensure accurate, consistent, and useful information management (2.3) to track the status and success of the training organization, and its compliance with Federal records management requirements. The large quantities of data and information within CHRIS are utilized by parties within and outside of the MEO, and must be managed to assure accuracy, integrity, consistency, and availability. As CHRIS experts with the sole responsibility for establishing and maintaining a relationship between CHRIS and the DOE training community, the Information Managers will have the knowledge, skills, and access to best manage the storage and tracking of these data.

The Information Managers will also identify areas where the existing system can be enhanced to improve efficiency and effectiveness for CHRIS customers. For example, CHRIS currently validates data and refreshes the screen after entry of each field. This is extremely time

consuming and a source of frustration for the user. The Information Manager will work with the CHRIS technical staff to develop more efficient and effective capabilities.

Reporting Requirements

The Information Managers will work with the CHRIS technical staff to develop new formats and data tracking tools to better capture and access training information for accurate and timely reporting (2.4). This will address difficulties with data gathered directly from existing systems, which must often be transformed into a useable or reportable format, and significantly reduce the time required for report production. This improvement will provide the important benefit of keeping the COR and Core Group staff apprised of the activities of the MEO and of the overall needs of training within the line organizations serviced by the MEO

Needs Assessment

The Information Managers will work jointly with the training organization and the CHRIS technical personnel to identify areas where the Needs Assessment (3.1) process can be improved. They will encourage a transition from the current process, in which Needs Assessment data and input are gathered from a variety of sources and through a variety of means. Some customers have automated the Individual Development Plan (IDP) process outside of CHRIS, some utilize the CHRIS/ESS systems for IDP development, some track by hard copy, and others do not complete the requirement at all. The Information Managers will train and encourage managers to utilize the CHRIS/ESS capabilities to develop IDPs. The resultant automated data will be easier to analyze, process, and report. The annual Needs Assessment can be completed at lower cost in a shorter time frame, and automated back-up data will be more complete and available for further analysis as needed.

The Information Managers' involvement in improving the Needs Assessment process by increasing use of automated IDPs will also benefit the training organization's identification of multi-office training needs. Cost efficiencies will be improved by reducing multiple instances of individual class attendance, and by bringing training on-site when the need is justified versus sending individuals off-site. The ability to meet employee needs identified through the automated IDP process will be increased.

Evaluation

The Information Managers will work to implement electronic course evaluations through CHRIS (3.2) and assist customers to understand the process. The course evaluation process is a resource intensive requirement. Automating the process will have multiple advantages, including:

- Acceleration of workflow due to electronic documentation and routing.
- A higher rate of return.
- Easier review of evaluations (electronic data are easier to manipulate and analyze).
- Assistance to prospective students who are choosing between training alternatives by providing electronic evaluation ratings and comments via the course catalog through ESS.
- Electronic calculating and reporting on evaluation data.

The return on investment in this area is anticipated to be of significant value.

Customer Service

For Customer Service (3.3), the Information Managers will serve as points of contact and liaisons between the CHRIS technical staff and CHRIS users (e.g., Human Resources Assistants) at the Operations Centers. The Information Managers will be on-site references for

Operations Center staff, with the knowledge and skills to correct problems and prioritize needs. Employees serviced by the Operations Center staff will also have access to the services of the Information Managers during the required customer service hours of operation.

The Information Managers will identify and recommend improvements in the maintenance of the course catalog and vendor listing (both part of CHRIS). This will help to reduce manual training requests, improve workflow, and improve the registration of trainees. Ensuring the course catalog is up-to-date and accurate will allow customers to have the best list available when registering for classes, which in turn will eliminate unnecessary searches or attempted registrations for classes that are no longer offered or that do not meet required standards or needs.

CHRIS Modification

The Information Managers will serve as primary resources for the COR and assist with the CHRIS modification process including Systems Integration Testing (SIT), as required by the PWS (3.3.18). While the MEO Team has proposed staff sufficient to meet this need, the Information Managers will be able to provide a higher quality and a more technically refined approach to the modification process. Instead of providing a brief study or quick survey, the Information Manager will be able to provide recommendations that are based on technically feasible alternatives.

3. Impact on Measurements in PWS Appendix F

CHRIS is an integral part of most training support services and products. Therefore, the MEO Team anticipates the two Information Managers will have a substantial and positive impact on the measurements in PWS Appendix F.

Specifically, the Information Managers' technical abilities, combined with their daily involvement with training support service operations, will contribute to consistently meeting or exceeding the standard of no more than two rewrites of policy recommendations, and ensure these recommendations are to the COR at or before the required due date. It is anticipated that this enhancement will result in a reduction of the Acceptable Level of Performance (ALP) for the CHRIS portion of policy recommendations from 5% to 2%.

The Information Managers' input and suggestions to automate the Needs Assessment process will help DOE Elements complete not only more accurate and thorough assessments, but also help Elements complete the assessments well within the prescribed timeline. The automation of this process and tracking of all possible data in the system will improve the quality of Needs Assessments, as well as ensure the assessment accurately reflects organizational, occupational, and individual training needs. In addition, ad hoc needs assessments (3.1.1) can be better targeted to meet COR needs. It is anticipated that with this enhancement the ALP for the timeliness and quality of Needs Assessment will be reduced from 5% to 2%.

The Information Managers' involvement in automating the evaluation process will not only decrease the resources necessary to perform the evaluations but will also help to ensure a more user-friendly method for submitting evaluations, thus increasing the number and quality of evaluations completed. This will ultimately result in more accurate and targeted recommendations for training delivery. Additionally, being able to check course data more often and more easily will help to improve the quality and timeliness of evaluation reviews. It is anticipated that this will enhance the ALP for the timeliness and quality of course evaluation reviews from 5% to 2%.

The Information Managers will play a critical role in customer service. Because the CHRIS system is used to register, locate classes, and keep customers informed of training information,

the Information Manager will help ensure that CHRIS is able to meet their needs in a timely, user-friendly manner. The Information Managers will serve as proactive resources helping to identify problems before they occur, identifying deficiencies in the data maintained in CHRIS, and recommending changes to CHRIS to better serve DOE. The Information Managers will be able to improve the ability to meet deadlines and will work to fully utilize CHRIS capabilities to improve efficiency. It is anticipated that with this enhancement the ALP for the timeliness and quality of customer service will on average be reduced from 5% to 2%.

The Information Managers' role in tracking data in CHRIS will help to ensure the accuracy and accessibility of data to meet DOE-specified information and formatting requirements. As automation increases, it is projected that there will be a corresponding reduction in the level of effort and time needed to prepare reports. It is anticipated that with this enhancement the ALP for the timeliness and quality of reporting will be reduced from 5% to 2%.

As the Information Managers continue to identify opportunities for improvements, the Organization's efficiency will improve. The MEO team believes this trend will continue throughout the term of the LOO. The MEO Team anticipates the Organization will become 5% more efficient annually. Furthermore, the MEO Team anticipates savings by providing better and more targeted services.

4. Technical Approach

The Information Managers will provide on-site consultations, observations, assistance, and recommendations at the Operations Centers. It is anticipated that the Information Managers' daily interactions with training support staff will help to facilitate a more accurate representation of the needs and concerns associated with CHRIS.

The Information Managers will regularly communicate with each other to discuss concerns and improvements. Further, the Information Managers will be a contact and resource for the Core Group for their CHRIS information and planning needs. The Information Managers will be available to discuss CHRIS with the COR and the Continuing Government Organization.

5. Human Resources Needed

This enhancement proposes the use of two GS-201-12 Human Resources Specialists (Information Managers).

6. Other Considerations

The Information Manager's streamlining and process improvement initiatives will have an impact on quality control and customer satisfaction. Ease of use by the customers through the training identification and registration process will dramatically impact the satisfaction of the customer. Information Managers will be available to answer technical questions and problems during established business hours.

Conclusion

The MEO Team believes these Information Manager positions will benefit both the Training Support Services Organization and DOE as a whole. CHRIS and its associated programs are the core of training administration and record-keeping. Improvements in system utilization, capability, and maintenance of basic components of the system will enhance and streamline customer services, registration of trainees, development of needs assessments, and reporting on training frequencies, locations, and costs.

The Information Managers are imbedded in the day-to-day operations of the Organization which will help to identify needs and improvements. By ensuring best utilization of CHRIS capabilities, training will be more efficiently identified and scheduled to meet customer needs. While the MEO Team recognizes the two additional positions are an added cost, the value of the service they provide outweighs this cost. The overall training program, DOE Elements, and customers throughout DOE will benefit from the improvements and understanding these Information Managers will bring to the MEO.

APPENDIX A

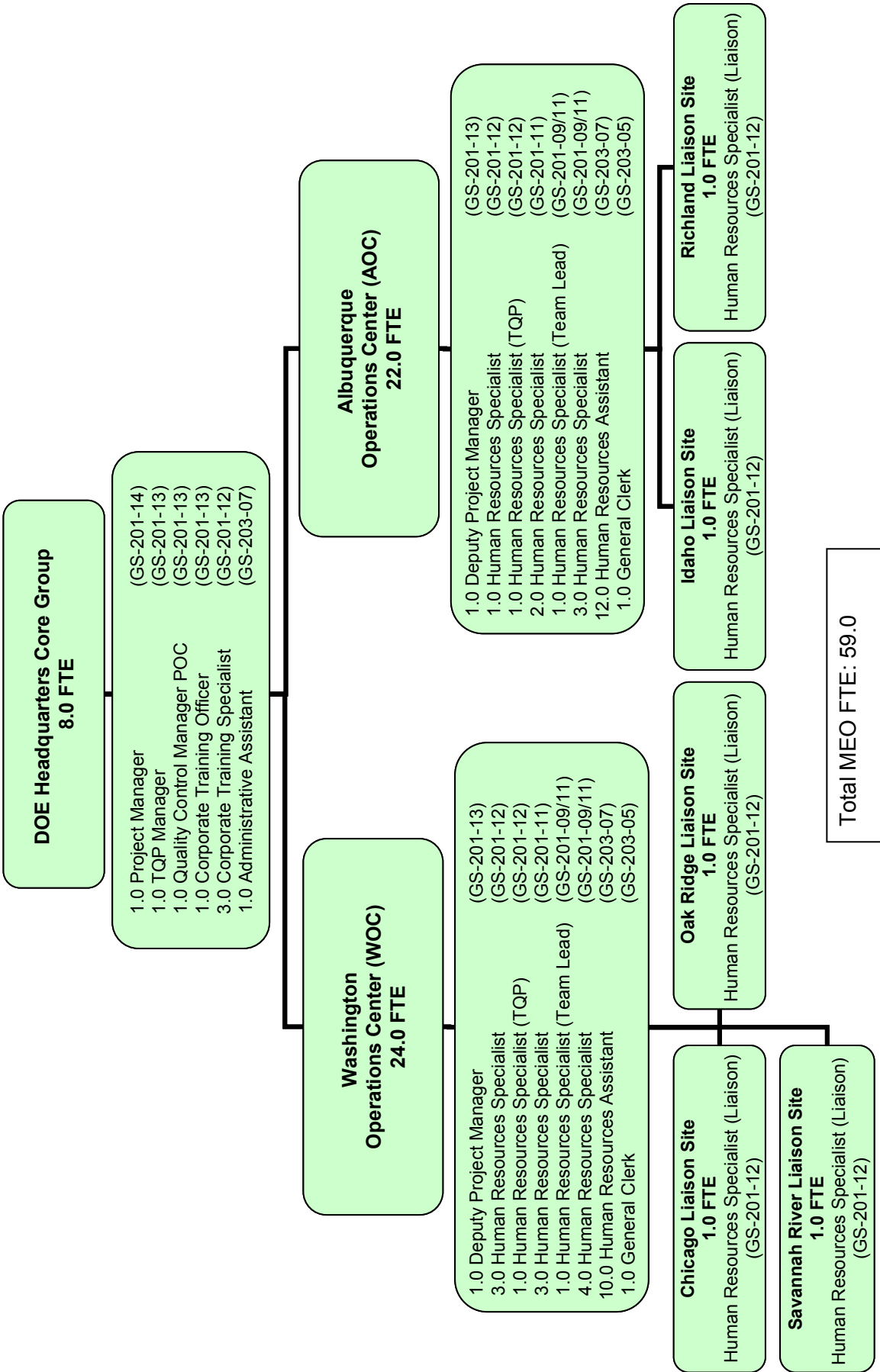
ACRONYMS AND ABBREVIATIONS

Acronym/ Abbreviation	Definition
AL	Albuquerque
AOC	Albuquerque Operations Center
AT	Agency Tender
CBT	Computer-Based Training
CGO	Continuing Government Organization
CHI	Chicago
CHRIS	Corporate Human Resource Information System
CI	Congressional and Intergovernmental Affairs
COR	Contracting Officer's Representative
DNFSB	Defense Nuclear Facility Safety Board
DOE	Department of Energy
ED	Economic Impact and Diversity
EE	Energy Efficiency and Renewable Energy
EIA	Energy Information Administration
EM	Environmental Management
ESS	Employee Self Service
FE	Fossil Energy
FTCP	Federal Technical Capability Panel
FTE	Full Time Equivalent
FY	Fiscal Year
GAO	General Accounting Office
GC	General Counsel
HCMIP	Human Capital Management Improvement Program
HDBK	Handbook
HG	Hearings and Appeals
HR	Human Resources
HRA	Human Resources Advisor

Acronym/ Abbreviation	Definition
ID	Idaho
IDP	Individual Development Plan
IM	Chief Information Officer
ITV	Interactive Television
LMR	Labor-Management Relations
M&I	Management and Integration
M&O	Management and Operating
ME	Office of Management, Budget, and Evaluation
MEO	Most Efficient Organization
MOU	Memorandum of Understanding
NE	Nuclear Energy, Science, and Technology
NETL	National Energy Technology Laboratory
NNSA	National Nuclear Security Administration
NNSA-AL	NNSA Albuquerque
NNSA-LL	NNSA Oakland
NNSA-NV	NNSA Nevada
NV	Nevada
OA	Independent Oversight and Performance Assurance
OAK	Oakland
OC	Operations Center
OH	Ohio
OMB	Office of Management and Budget
OPM	Office of Personnel Management
ORO	Oak Ridge Office
PA	Public Affairs
PD	Position Descriptions
PI	Policy and International Affairs
PM	Project Manager
POC	Point of Contact
PRS	Performance Requirements Summary
PWS	Performance Work Statement

Acronym/ Abbreviation	Definition
QA	Quality Assurance
QC	Quality Control
RF	Rocky Flats
RL	Richland
RW	Radioactive Waste
SC	Office of Science
SIT	Systems Integration Testing
SME	Subject Matter Expertise
SO	Office of Security
SOW	Statement of Work
SPRO	Strategic Petroleum Reserve Office
SR	Savannah River
TQP	Technical Qualification Program
WOC	Washington Operations Center
WT	Worker and Community Transition

APPENDIX B
MEO ORGANIZATIONAL CHART



APPENDIX C-1

PWS CROSSWALK BY TASK TO ASSIGNED STAFF

FA	PWS Para. No.	Description	Unit of Measure	Freq- uency	Time per Task	Required Hrs.*	Series	Grade	Position	Location
1	Section 1.0	INTRODUCTION								
1	1.1	DOE Federal Training Function Overview								
1	1.2	Organization of the Performance Work Statement								
2	Section 2.0	SCOPE OF WORK								
2.1	2.1	General Requirements								
2.1	2.1.1	Serve as a liaison for DOE Federal Training Function with DOE specified locations. A list of DOE locations is provided in Appendix A: DOE Locations.	No. of Elements	5	60.00	300.00	GS-201	12	Human Resources Specialist	AOC
2.1	2.1.1	Same as Above	No. of Elements	23	60.00	1,380.00	GS-201	12	Human Resources Specialist	WOC
2.1	2.1.1	Same as Above	No. of Elements	1	60.00	60.00	GS-201	12	Human Resources Liaison	SAV RVR
2.1	2.1.1	Same as Above	No. of Elements	1	60.00	60.00	GS-201	12	Human Resources Liaison	CHICAGO
2.1	2.1.1	Same as Above	No. of Elements	1	60.00	60.00	GS-201	12	Human Resources Liaison	RICH
2.1	2.1.1	Same as Above	No. of Elements	1	60.00	60.00	GS-201	12	Human Resources Liaison	IDAHO
2.1	2.1.1	Same as Above	No. of Elements	1	60.00	60.00	GS-201	12	Human Resources Liaison	OAK RIDGE
2.1	2.1.2	Provide policy recommendations on development, coordination, implementation, & evaluation of DOE-wide training in accordance with DOE Order 360.1B, Section 5e to the COR when requested. It also includes provision of professional advice & consulting assistance to DOE. Final policy decisions on recommendations remain with the Federal Gov't.	No. of times Recs. Sought	57	4.13	235.41	GS-201	13	Corporate Training Officer	CORE
2.1	2.1.2	Same as Above	No. of times	65	4.13	268.45	GS-201	12	Corporate Training	CORE

FA	PWS Para. No.	Description	Unit of Measure	Freq- uency	Time per Task	Required Hrs.*	Series	Grade	Position	Location
			Recs. Sought						Specialist	
2.1	2.1.2	Same as Above	No. of times Recs. Sought	50	4.13	206.50	GS-201	13	Quality Control Management POC	CORE
2.1	2.1.2	Same as Above	No. of times Recs. Sought	50	4.13	206.50	GS-201	12	Human Resources Specialist	AOC
2.1	2.1.2	Same as Above	No. of times Recs. Sought	50	4.13	206.50	GS-201	12	Human Resources Specialist	WOC
2.1	2.1.3	Reserved								
2.1	2.1.4	When requested by the COR, the SP will assist DOE Managers with interagency liaison & provide input & recommendations for interagency agreements in respect to DOE-wide training in accordance with DOE Order 360.1B, Section 5e(3).	No. of times Recs. Sought	15	12.71	190.65	GS-201	13	Corporate Training Officer	CORE
2.1	2.1.4	Same as Above	No. of times Recs. Sought	20	12.71	254.20	GS-201	12	Corporate Training Specialist	CORE
2.1	2.1.5	Administer and ensure multi-element DOE training in accordance with DOE Order 360.1-1B and DOE Manual 360.1-1B, paragraph 4B.	No. Multi- element Training Pgms. (Count equals all Career Dev. Pgms.)	20	10.00	200.00	GS-201	12	Corporate Training Specialist	CORE
2.1	2.1.5	Same as Above	See Above (No. = selected pgm	6	10.00	60.00	GS-201	12	Human Resources Specialist	WOC
2.1	2.1.5	Same as Above	See Above (No. = selected pgm	6	10.00	60.00	GS-201	12	Human Resources Specialist	AOC
2.1	2.1.6	Provide an annual training plan in accordance with DOE Manual 360.1-1B, Ch. I, Sect. 3. The training plan shall include but not be limited to recommended objectives & priorities for the DOE Federal Training Function, identifying the estimated number of employees to be trained, types & sources of training, resource requirements, & evaluation processes. The training plan shall be provided to the COR for review & approval by September 30 of each year. The COR will approve any changes to this plan.	No. of Annual Training Plans	1	311.00	311.00	GS-201	12	Corporate Training Specialist	CORE
2.1	2.1.6	Same as Above	No. of Annual Training Plans	1	100.00	100.00	GS-201	13	Corporate Training Officer	CORE

FA	PWS Para. No.	Description	Unit of Measure	Freq- uency	Time per Task	Required Hrs.*	Series	Grade	Position	Location
2.1	2.1.7	Provide support to each DOE element in preparation of its annual training plan in accordance with DOE Manual 360.1-1B, Chapter I, Section 3 by July 31 of each year. Support shall include but not be limited to recommendations for objectives and priorities for the DOE element, identifying the est. number of employees to be trained, types and sources of training, resource requirements, and evaluation processes.	No. of Element Training Plans	See below						
2.1	2.1.7	Same as Above	No. of Element Training Plans	5	26.33	131.65	GS-201	12	Human Resources Specialist	AOC
2.1	2.1.7	Same as Above	No. of Element Training Plans	23	26.33	605.59	GS-201	12	Human Resources Specialist	WOC
2.1	2.1.7	Same as Above	No. of Element Training Plans	1	26.33	26.33	GS-201	12	Human Resources Liaison	SAV RVR
2.1	2.1.7	Same as Above	No. of Element Training Plans	1	26.33	26.33	GS-201	12	Human Resources Liaison	CHICAGO
2.1	2.1.7	Same as Above	No. of Element Training Plans	1	26.33	26.33	GS-201	12	Human Resources Liaison	RICH
2.1	2.1.7	Same as Above	No. of Element Training Plans	1	26.33	26.33	GS-201	12	Human Resources Liaison	OAK RIDGE
2.1	2.1.7	Same as Above	No. of Element Training Plans	1	26.33	26.33	GS-201	12	Human Resources Liaison	IDAHO
2.1	2.1.8	Provide all personnel, facilities, materials, supplies, equipment, & services required for the performance of the work in this PWS, which are not provided by the Gov't. GFP & services are addressed in Section 6.0.								
2.2	2.2	Workload Requirements								
2.2	2.2.1	The SP shall provide training support services for management of the estimated summary of estimated DOE Federal Training Instances as shown in Table C-1 (base year & option years).....								
2.2	2.2.2	In Appendix B, Est. Workload, a table is provided that represents the estimated level of effort for the indicated sections. This information represents the Gov'ts best estimate of future workload....								
2.2	2.2.3	DOE Federal officials will approve and authorize training and certify that appropriate funds are available. Payments to Contractors delivering training will not be passed through this								

DIRECTIVE- NOT QUANTIFIED

DIRECTIVE- NOT QUANTIFIED

INFORMATIONAL

DIRECTIVE- NOT QUANTIFIED

FA	PWS Para. No.	Description	Unit of Measure	Freq- uency	Time per Task	Required Hrs.*	Series	Grade	Position	Location
		contract.								
2.3	2.3	Information Management Requirements								
2.3		Gov't-furnished classified & unclassified files that are active and in existence at Contract start date shall be maintained in accordance with DOE Order 470.1, DOE Order 200.1, Information Management Program, & DOE Guide 1324B, Implementation Guide for Records Management.....								
2.4	2.4	Reporting Requirements								
2.4		The SP shall provide recurring reports to the COR. Detailed instructions on requirements for report format, content, distribution, & due dates will be provided upon award; instructions may be changed... A list of all required reports is included as Appendix D: Required Reports.								
3	3.0	PERFORMANCE REQUIREMENTS								
3.1		This is a performance-based contract subject to objectives, measures, and expectations contained in this PWS. The SP agrees that unacceptable work as designated by the COR must be corrected by the SP at no additional cost to the Government. The SP will be evaluated annually. Ratings will be provided to the SP for comment.								
3.1	3.1	Needs Assessment								
3.1	3.1.1	Annually assist each DOE element in identifying its critical training needs through organizational, occupational, & individual assessment using information such as but not limited to revised or updated individual development plans by June 30 of each year in accordance with DOE Order 360.1B, Section 4b, DOE M 360.1-1B, Chap. I, Section 4, & DOE M 426.1, FTC Manual, Section 4b.	No. of Elements	5	16.86	84.30	GS-201	11	Human Resources Specialist	AOC
3.1	3.1.1	Same as Above	No. of Elements	23	16.86	387.78	GS-201	11	Human Resources Specialist	WOC
3.1	3.1.1	Same as Above	No. of Elements	1	16.86	16.86	GS-201	12	Human Resources Liaison	SAV RVR
3.1	3.1.1	Same as Above	No. of Elements	1	16.86	16.86	GS-201	12	Human Resources Liaison	CHICAGO
3.1	3.1.1	Same as Above	No. of Elements	1	16.86	16.86	GS-201	12	Human Resources	RICH

FA	PWS Para. No.	Description	Unit of Measure	Freq- uency	Time per Task	Required Hrs.*	Series	Grade	Position	Location
									Liaison	
3.1	3.1.1	Same as Above	No. of Elements	1	16.86	16.86	GS-201	12	Human Resources Liaison	OAK RIDGE
3.1	3.1.1	Same as Above	No. of Elements	1	16.86	16.86	GS-201	12	Human Resources Liaison	IDAHO
3.1	3.1.1	Receive and Review IDPs	IDPs Reviewed (based on 50% of Cust. Base)	1,074	0.68	730.32	GS-201	11	Human Resources Specialist	AOC
3.1	3.1.1	Receive and Review IDPs	IDPs Reviewed	2,657	0.68	1,806.42	GS-201	11	Human Resources Specialist	WOC
3.1	3.1.1	Receive and Review IDPs	IDPs Reviewed	224	0.68	152.32	GS-201	12	Human Resources Liaison	SAV RVR
3.1	3.1.1	Receive and Review IDPs	IDPs Reviewed	203	0.68	137.70	GS-201	12	Human Resources Liaison	CHICAGO
3.1	3.1.1	Receive and Review IDPs	IDPs Reviewed	236	0.68	160.48	GS-201	12	Human Resources Liaison	RICH
3.1	3.1.1	Receive and Review IDPs	IDPs Reviewed	232	0.68	157.76	GS-201	12	Human Resources Liaison	OAK RIDGE
3.1	3.1.1	Receive and Review IDPs	IDPs Reviewed	176	0.68	119.34	GS-201	12	Human Resources Liaison	IDAHO
3.1	3.1.2	Coordinate and evaluate multi-element training needs assessments that are designed to meet DOE-wide training program objectives in accordance with DOE Order 360.1B, Section 4b, DOE Manual 360.1-1B, Chapter I, Section 4, and DOE M 426.1, Federal Technical Capability Manual, Section 4b.	No. of Multi- element Need Assess. (based on CDP)	20	80.00	1,600.00	GS-201	12	Corporate Training Specialist	CORE
3.1	3.1.3	Assist in developing of new needs assessments whenever new training requirements are issued, when job performance is identified as below standard, & when requests for changes to current training or for new training are received in accordance with DOE Manual 360.1-1B, Chap. I, Section 4 and DOE M 426.1, FTCM, Section 4b.	No. of New Needs Assessments (Portions)	1	100.00	100.00	GS-201	12	Human Resources Specialist	AOC
3.1	3.1.3	Same as Above	No. of New Needs Assessments (Portions)	1	100.00	100.00	GS-201	12	Human Resources Specialist	WOC

FA	PWS Para. No.	Description	Unit of Measure	Freq- uency	Time per Task	Required Hrs.*	Series	Grade	Position	Location
3.2	3.2	Evaluation								
3.2	3.2.1	Monitor functions that include but are not limited to initiating, evaluating, and tracking improvements to training curricula, while ensuring training materials are current, evaluating training facilities to determine that training is conducted in the setting most suitable for the particular training content, & monitoring regulatory developments in accordance with DOE Order 360.1B, Sect. 4g & 4l. Report any discrepancies & recommend corrective actions to the COR.								
3.2	3.2.1	Same as Above	No. of Course Offerings Evaluated	3	14.00	42.00	GS-201	12	Human Resources Liaison	SAV RVR
3.2	3.2.1	Same as Above	No. of Course Offerings Evaluated	3	14.00	42.00	GS-201	12	Human Resources Liaison	CHICAGO
3.2	3.2.1	Same as Above	No. of Course Offerings Evaluated	3	14.00	42.00	GS-201	12	Human Resources Liaison	RICH
3.2	3.2.1	Same as Above	No. of Course Offerings Evaluated	3	14.00	42.00	GS-201	12	Human Resources Liaison	OAK RIDGE
3.2	3.2.1	Same as Above	No. of Course Offerings Evaluated	3	14.00	42.00	GS-201	12	Human Resources Liaison	IDAHO
3.2	3.2.2	Verify 25% of course offerings each quarter that training is based on needs assessment data and reflects job performance requirements.	No. of Course Offerings	450	0.75	337.50	GS-201	09/11	Human Resources Specialist	AOC
3.2	3.2.2	Same as Above	No. of Course Offerings	639	0.75	479.06	GS-201	09/11	Human Resources Specialist	WOC
3.2	3.2.3	Verify 25% of course offerings each quarter that learning objectives are observable and measurable.	No. of Course Offerings	450	0.6	270.00	GS-201	09/11	Human Resources Specialist	AOC
3.2	3.2.3	Same as Above	No. of Course Offerings	639	0.6	383.25	GS-201	09/11	Human Resources Specialist	WOC

ACTIVITIES INCLUDED BELOW

FA	PWS Para. No.	Description	Unit of Measure	Freq- uency	Time per Task	Required Hrs.*	Series	Grade	Position	Location
3.2	3.2.4	Verify 25% of course offerings each quarter that training evaluation standards include but are not limited to determination of: testing limitations; task elements to be tested; clearly defined knowledge, skills, and abilities requirements; entry-level requirements; clearly stated conditions and standards; doable objectives; and equitable scoring methods.	No. of Course Offerings	450	1.05	472.50	GS-201	09/11	Human Resources Specialist	AOC
3.2	3.2.4	Same as Above	No. of Course Offerings	639	1.05	670.69	GS-201	09/11	Human Resources Specialist	WOC
3.2	3.2.5	Verify 25% of course offerings each quarter that established course testing requirements, and in response to or approved by the COR in the annual training plan, are in accordance with DOE HDBK 1078 94, Chapter 3, Section 3.3.	No. of Course Offerings	450	1.05	472.50	GS-201	09/11	Human Resources Specialist	AOC
3.2	3.2.5	Same as Above	No. of Course Offerings	639	1.05	670.69	GS-201	09/11	Human Resources Specialist	WOC
3.2	3.2.6	Verify 25% of course offerings each quarter that test items are consistent with the learning objectives to include but not limited to test item format and number of test items to be developed, as well as skill and knowledge test items, validating contents of test items and incorporating items into test bank for future use in accordance with DOE HDBK 1078 94, Chapter 3, Section 3.3.	No. of Course Offerings	450	0.83	373.50	GS-201	09/11	Human Resources Specialist	AOC
3.2	3.2.6	Same as Above	No. of Course Offerings	639	0.83	530.16	GS-201	09/11	Human Resources Specialist	WOC
3.2	3.2.7	Verify 25% of course offerings each quarter that tests include but are not limited to determination of performance-testing limitations, scoring methods for performance tests, and test administration guidelines in accordance with DOE HDBK 1078 94, Chapter 3, Section 3.3.	No. of Course Offerings	450	0.92	414.00	GS-201	09/11	Human Resources Specialist	AOC
3.2	3.2.7	Same as Above	No. of Course Offerings	639	0.92	587.65	GS-201	09/11	Human Resources Specialist	WOC
3.2	3.2.8	Verify 25% of course offerings each quarter that course loading and scheduling requirements are determined in accordance with DOE-HDBK-1078-94, Chapter 3, Section 3.5.2.	No. of Course Offerings	450	0.6	270.00	GS-201	09/11	Human Resources Specialist	AOC
3.2	3.2.8	Same as Above	No. of Course Offerings	639	0.6	383.25	GS-201	09/11	Human Resources Specialist	WOC

FA	PWS Para. No.	Description	Unit of Measure	Freq- uency	Time per Task	Required Hrs.*	Series	Grade	Position	Location
3.2	3.2.9	Verify 25% of course offerings each quarter that course curriculum outline is developed in accordance with DOE-HDBK-1078-94, Section 3.5.8.	No. of Curriculum Verified	450	0.4	180.00	GS-201	09/11	Human Resources Specialist	AOC
3.2	3.2.9	Same as Above	No. of Curriculum Verified	639	0.4	255.50	GS-201	09/11	Human Resources Specialist	WOC
3.2	3.2.10	Verify 25% of course offerings each quarter that selected training methods include but not limited to lecture, demonstration, practice, discussion, facilitation, oral questioning, role playing, walk-through, and self-pacing in accordance with DOE-HDBK-1078-94, Section 4.1.	No. of Courses Reviewed	450	1.05	472.50	GS-201	09/11	Human Resources Specialist	AOC
3.2	3.2.10	Same as Above	No. of Courses Reviewed	639	1.05	670.69	GS-201	09/11	Human Resources Specialist	WOC
3.2	3.2.11	Verify 25% of course offerings each quarter that lesson plans include but are not limited to documenting learning objectives and developing content, learning activities, training equipment, and training materials needed for training is in accordance with DOE-HDBK-1078-94, Section 4.2.	No. of Courses Reviewed	158	1.91	300.83	GS-201	11	Human Resources Specialist	AOC
3.2	3.2.11	Same as Above	No. of Courses Reviewed	415	1.91	793.01	GS-201	09/11	Human Resources Specialist	AOC
3.2	3.2.11	Same as Above	No. of Courses Reviewed	224	1.91	427.00	GS-201	11	Human Resources Specialist	WOC
3.2	3.2.11	Same as Above	No. of Courses Reviewed	415	1.91	793.01	GS-201	09/11	Human Resources Specialist	WOC
3.2	3.2.12	Verify 25% of course offerings each quarter that printed material for training purposes is in accordance with DOE-HDBK-1078-94, Section 4.3.	No. of Courses Reviewed	Included in above						
3.2	3.2.12	Same as Above	No. of Courses Reviewed	Included in above						
3.2	3.2.13	Verify 25% of course offerings each quarter that training is conducted in accordance with DOE Order 360.1B and DOE Manual 360.1-1B.	No. of Courses Reviewed	450	0.83	373.50	GS-201	09/11	Human Resources Specialist	AOC
3.2	3.2.13	Same as Above	No. of Courses Reviewed	639	0.83	530.16	GS-201	09/11	Human Resources Specialist	WOC

FA	PWS Para. No.	Description	Unit of Measure	Freq- uency	Time per Task	Required Hrs.*	Series	Grade	Position	Location
3.2	3.2.14	Verify 25% of course offerings each quarter that in-training evaluations include but are not limited to collecting evaluation information from test performance data, as well as instructor and trainee critiques in accordance with DOE Order 360.1B, Section 4l and DOE Manual 360.1-1B, Chapter I, Sections 9 and 13.	No. of Courses Reviewed	450	1.43	643.50	GS-201	09/11	Human Resources Specialist	AOC
3.2	3.2.14	Same as Above	No. of Courses Reviewed	639	1.43	913.41	GS-201	09/11	Human Resources Specialist	WOC
3.2	3.2.15	RESERVED								
3.2	3.2.16	Assist the COR in obtaining market surveys, drafting work statements, evaluation criteria, & solicitation documentation; as well as in evaluating proposals for training courses, seminars, general training, & support services.	No. of Instances Assisting COR	90	8.53	767.70	GS-201	11	Human Resources Specialist	AOC
3.2	3.2.16	Same as Above	No. of Instances Assisting COR	128	8.53	1,089.71	GS-201	11	Human Resources Specialist	WOC
3.2	3.2.16.1	If current training providers are not available, then recommend a new training provider. If recommending a new training provider, the SP shall do a market analysis and provide to the COR.	No. of Instances (Est.)	15	4.00	60.00	GS-201	11	Human Resources Specialist	AOC
3.2	3.2.16.1	Same as Above	No. of Instances (Est.)	20	4.00	80.00	GS-201	11	Human Resources Specialist	WOC
3.2	3.2.17	Collect employee & supervisor feedback on training adequacy & the training system's ability to meet training goals and objectives in accordance with DOE Order 360.1B, Section 4g and 4l. Analyze information collected to include but not limited to frequency distributions, exception, content analysis, & root cause identification. Provide a report on this analysis to the COR within 15 calendar days after the end of each quarter.	No. of Course Evaluations Submitted	3,991	0.25	997.86	GS-201	11	Human Resources Specialist	AOC
3.2	3.2.17	Same as Above	No. of Course Evaluations Submitted	210	0.25	52.52	GS-201	12	Human Resources Specialist	AOC
3.2	3.2.17	Same as Above	No. of Course Evaluations Submitted	3,466	0.25	866.57	GS-201	11	Human Resources Specialist	WOC
3.2	3.2.17	Same as Above	No. of Course Evaluations Submitted	385	0.25	96.29	GS-201	12	Human Resources Specialist	WOC

FA	PWS Para. No.	Description	Unit of Measure	Freq- uency	Time per Task	Required Hrs.*	Series	Grade	Position	Location
3.2	3.2.18	RESERVED								
3.2	3.2.19	Collect data on behavior changes of students if requested by the COR in accordance with DOE Order 360.1B, Section 4g and DOE HDBK 1078-94, Section 6.	No. of Instances	44	5.00	220.00	GS-201	11	Human Resources Specialist	AOC
3.2	3.2.19	Same as Above	No. of Instances	43	5.00	215.00	GS-201	11	Human Resources Specialist	WOC
3.2	3.2.20	Perform data collection and analysis of costs and benefits if requested by the COR in accordance with DOE Order 360.1B, Sections 4g, 5e(1) and 5e(2), 5g(4) and DOE HDBK 1078-94, Section 6.	No. of Instances	19	5.92	112.48	GS-201	12	Human Resources Specialist	AOC
3.2	3.2.20	Same as Above	No. of Instances	19	5.92	112.48	GS-201	11	Human Resources Specialist	AOC
3.2	3.2.20	Same as Above	No. of Instances	26	5.92	153.92	GS-201	12	Human Resources Specialist	WOC
3.2	3.2.20	Same as Above	No. of Instances	26	5.92	153.92	GS-201	11	Human Resources Specialist	WOC
3.3	3.3	Customer Service								
3.3	3.3.1	Provide a customer service function to students, attendees, & supervisors regarding classes, seminars, workshops, & special programs, class schedules, cancellations & rescheduling, enrollment procedures, course prerequisites, waivers, classroom assignments and course locations. This function shall include but not be limited to course catalogs with course descriptions, offering dates, costs, student registration information, facilities, amenities, & research resources. This function shall be available during business hours of 8:00 a.m. to 8:00 p.m. EST excluding weekends & Federal holidays.	See 3.3.2 through 3.3.14							
3.3	3.3.2	Register or enroll students and attendees in classes, seminars, workshops, and other training.	No. of Student Enrollments	14005	0.31	4,341.55	GS-203	07	Human Resources Assistant	AOC
3.3	3.3.2	Same as Above	No. of Student Enrollments	12838	0.31	3,979.78	GS-203	07	Human Resources Assistant	WOC

FA	PWS Para. No.	Description	Unit of Measure	Freq- uency	Time per Task	Required Hrs.*	Series	Grade	Position	Location
3.3	3.3.3	Maintain student or attendee enrollment/registration information, using the CHRIS in accordance with CHRIS TR Users' Manual, Chap. 3. Produce various reports regarding courses, classes, students/ attendees, customers and POCs, as well as other training and registration-related information using CHRIS and DOEInfo. Verify data is posted in CHRIS system within three working days of action.	No. of Student Enrollments	14005	0.18	2,520.90	GS-203	07	Human Resources Assistant	AOC
3.3	3.3.3	Same as Above	No. of Student Enrollments	12838	0.18	2,310.84	GS-203	07	Human Resources Assistant	WOC
3.3	3.3.4	Complete registration/enrollment of students/ attendees (DOE and non-DOE) in accordance with DOE Manual 360.1-1B, Chap. 1, Sect. 8; verify registration/ enrollment information; enter requisite registration/ enrollment information into CHRIS; communicate with POCs regarding student/attendee changes in registration status; confirm student/attendee registration; notify students of completed registration, class date, place & time; establish & maintain class folders; prepare/produce certificates of completion; prepare/produce class rosters and certificate lists; in accordance with CHRIS TR Users' Manual, Chap. 3	No. of Courses	450	0.18	81.00	GS-203	07	Human Resources Assistant	AOC
3.3	3.3.4	Same as Above	No. of Courses	639	0.18	114.98	GS-203	07	Human Resources Assistant	WOC
3.3	3.3.5	Answer incoming calls by phone, email or facsimile; identify/clarify requests, inquiries, needs, and concerns of callers; take, prioritize, route, and document incoming and outgoing messages; facilitate resolution of complaints/problems (confering with the Federal employee supervisor on unusual matters); provide info on training products and services. Provide an initial response to incoming calls within one hour. Provide final response to incoming calls within one working day.	No. of Calls Yearly	19,705	0.2	3,940.98	GS-203	07	Human Resources Assistant	AOC
3.3	3.3.5	Same as Above	No. of Calls Yearly	13,979	0.2	2,795.74	GS-203	07	Human Resources Assistant	WOC
3.3	3.3.5	E-mail	No. of E-mails Yearly	33,747	0.05	1,687.34	GS-203	07	Human Resources Assistant	AOC
3.3	3.3.5	E-mail	No. of E-mails Yearly	23,940	0.05	1,197.01	GS-203	07	Human Resources Assistant	WOC

FA	PWS Para. No.	Description	Unit of Measure	Freq- uency	Time per Task	Required Hrs.*	Series	Grade	Position	Location
3.3	3.3.6	Ensure current information on training-related issues to include but not limited to classes, seminars, workshops, and other training-related programs are communicated through email and web sites to the customer in accordance with DOE Manual 360.1-1B, Chapter I, Section 7.	No. of Course Communicated	1,800	0.43	774.00	GS-203	07	Human Resources Assistant	AOC
3.3	3.3.6	Same as Above	No. of Course Communicated	2,555	0.43	1,098.65	GS-203	07	Human Resources Assistant	WOC
3.3	3.3.7	Ensure distribution/transmission of communications announcing upcoming classes, seminars, workshops, and other programs; receive requests for and distribute/transmit letters/memos waivers, certifications, instructor certifications, and site training records; assist in distributing/mailling brochures, flyers, and training materials; follow up to ensure mail outs, faxes, and emails are received.	Included in above Times							
3.3	3.3.8	Confirm student/attendee authorization for training in accordance with DOE Manual 360.1-1B, Chapter I, Section 8.	No. of Student Enrollments	14005	0.083	1,167.08	GS-203	07	Human Resources Assistant	AOC
3.3	3.3.8	Same as Above	No. of Student Enrollments	12838	0.083	1,069.83	GS-203	07	Human Resources Assistant	WOC
3.3	3.3.9	Produce monthly, year-to-date, and on-demand reports on student data/information by selecting, compiling, and processing information, as well as creating custom/special reports on student data/information in accordance with DOE Order 360.1B, Section 5e(4) and DOE Manual 360.1-1B, Chapter I, Section 3.	No. of Reports (based on # per element)	11	1.44	15.12	GS-201	09/11	Human Resources Specialist (Team Lead)	AOC
3.3	3.3.9	Same as Above	No. of Reports (based on # per element)	32	1.44	45.36	GS-201	09/11	Human Resources Specialist	AOC
3.3	3.3.9	Same as Above	No. of Reports (based on # per element)	39	1.44	56.16	GS-201	09/11	Human Resources Specialist (Team Lead)	WOC
3.3	3.3.9	Same as Above	No. of Reports (based on # per element)	117	1.44	168.48	GS-201	09/11	Human Resources Specialist	WOC
3.3	3.3.10	Recommend optimum DOE student/attendee enrollment/attendance levels for courses, seminars, workshops, and other DOE programs to the COR by monitoring DOE student/attendee request lists and contacting supervisors to determine student/attendee availability, status, or continued interest in DOE programs.	No. of Recommendations (based on # per element)	58	0.5	29.00	GS-203	07	Human Resources Assistant	AOC

FA	PWS Para. No.	Description	Unit of Measure	Freq- uency	Time per Task	Required Hrs.*	Series	Grade	Position	Location
3.3	3.3.10	Same as Above	No. of Recommendatio ns (based on # per element)	28	0.5	14.00	GS-203	07	Human Resources Assistant	WOC
3.3	3.3.11	Refer non-DOE training requests to the COR for review and approval by the COR. Coordinate training agreements and cost and payment information; register approved non-DOE students/attendees to include but not limited to military and contractor personnel in requested class/seminar/workshop; file approval paperwork in class file in accordance with DOE Order 360.1-1B, Chapter II, Section 2a.	No. of Non-DOE Requests	0	0.19	-	GS-203	07	Human Resources Assistant	AOC
3.3	3.3.11	Same as Above	No. of Non-DOE Requests	0	0.19	-	GS-203	07	Human Resources Assistant	WOC
3.3	3.3.12	Maintain class and classroom schedules by obtaining and verifying class information; entering class information into the schedule; updating the schedule following notification of changes and cancellations; verify clearance requirements for secured classes are met; and verify students meet course prerequisites.	No. of Reg. & Mandatory Course	1520	0.86	1,307.20	GS-203	07	Human Resources Assistant	AOC
3.3	3.3.12	Same as Above	No. of Reg. & Mandatory Course	2024	0.86	1,740.64	GS-203	07	Human Resources Assistant	WOC
3.3	3.3.13	Produce class rosters by coding and processing student/attendee information; verify and correct student/attendee enrollment, withdrawal, and course completion information; distribute class rosters following distribution procedures; and maintain class rosters in class folders in accordance with DOE Order 360.1B, Sections 4g, 4h, and 4i.	No. of Reg. & Mandatory Course	1520	0.29	440.80	GS-203	07	Human Resources Assistant	AOC
3.3	3.3.13	Same as Above	No. of Reg. & Mandatory Course	2024	0.29	586.96	GS-203	07	Human Resources Assistant	WOC
3.3	3.3.14	Establish and maintain communication with DOE, DOE Contractor, training managers, designated POCs from each DOE element, and outside agency POCs. Establish and maintain a current list of names and contact information.	No. of Providers + Elements	400	0.29	116.00	GS-203	07	Human Resources Assistant	AOC
3.3	3.3.14	Same as Above	No. of Providers + Elements	300	0.29	87.00	GS-203	07	Human Resources Assistant	WOC

FA	PWS Para. No.	Description	Unit of Measure	Freq- uency	Time per Task	Required Hrs.*	Series	Grade	Position	Location
3.3	3.3.15	Provide training and qualification records/files for historical reference by establishing, organizing, and maintaining printed and electronic records and files; maintain an effective system for storing and retrieving information (printed and electronic), utilizing standard and/or electronic filing and retrieval systems; prepare records and files for archiving; follow records management procedures in accordance with DOE Order 360.1B, Section 4h and 4i, and DOE Manual 360.1-1B, Chapter I, Sections 9, 10, and 11.	No. of Hours	N/A	N/A	1,236.30	GS-203	05	General Clerk	AOC
3.3	3.3.15	Same as Above	No. of Hours	N/A	N/A	1,236.30	GS-203	05	General Clerk	WOC
3.3	3.3.16	Provide periodic formal reports as identified in Appendix D: Required Reports.	See Section Below							
3.3	3.3.17	Provide support to web-based training systems.	See Section Below							
3.3	3.3.17.1	When requested by the COR, manage, administer, and maintain subscriptions for web-based training systems.	No. of Requests Related to Subscrips.	10	10.00	100.00	GS-201	09/11	Human Resources Specialist	WOC
3.3	3.3.17.1	Same as Above	No. of Requests Related to Subscrips.	10	10.00	100.00	GS-201	09/11	Human Resources Specialist (Team Lead)	WOC
3.3	3.3.17.1	Same as Above	No. of Requests Related to Subscrips.	7.5	10.00	75.00	GS-201	09/11	Human Resources Specialist	AOC
3.3	3.3.17.1	Same as Above	No. of Requests Related to Subscrips.	7.5	10.00	75.00	GS-201	09/11	Human Resources Specialist (Team Lead)	AOC
3.3	3.3.17.2	The SP shall receive applications for access, process those applications, and inform employees of the status of their applications. Once applications are approved, the SP shall provide employees with user identifications (user IDs) and instructions on how to access the system.	No. of New Applications	100	0.17	16.67	GS-201	09/11	Human Resources Specialist	WOC
3.3	3.3.17.2	Same as Above	No. of New Applications	100	0.17	16.67	GS-201	09/11	Human Resources Specialist	AOC

FA	PWS Para. No.	Description	Unit of Measure	Freq- uency	Time per Task	Required Hrs.*	Series	Grade	Position	Location
3.3	3.3.17.3	When requested by the COR, assist with analyzing the benefits of web-based training systems collaboration tools, evaluating their ability to meet training goals and objectives, defining blended effective learning strategies, planning and managing e-Gov't training functions on an DOE-wide basis, scoping and specifying customized learning and development content and system libraries, and marketing solutions to the identified target audience(s).	No. of Hours	N/A	N/A	117.00	GS-201	12	Corporate Training Specialist	CORE
3.3	3.3.18	When requested by the COR, assist with the CHRIS Modification Process to include but not limited to making recommendations for CHRIS/training modification, and performing Systems Integration Testing (SIT). SIT testing includes but is not limited to preparing scripts for all accepted modifications, conducting pre-testing in two databases (DEV {Developmental Database} and SIT) before the formal SIT, and formal testing of the SIT script.	No. of Instances	4	12.00	48.00	GS-201	12	Corporate Training Specialist	CORE
3.3	3.3.18	Same as Above	No. of Instances	4	12.00	48.00	GS-201	09/11	Human Resources Specialist	AOC
3.3	3.3.18	Same as Above	No. of Instances	4	12.00	48.00	GS-201	09/11	Human Resources Specialist	WOC
3.3	3.3.18	Same as Above	No. of Instances	4	5.00	20.00	GS-203	07	Human Resources Assistant	WOC
3.3	3.3.19	Attend quarterly DOE Training Working Capital Fund meetings and prepare and analyze draft reports as requested by the COR.	No. of WCF reports	4	6.00	66.00	GS-201	12	Corporate Training Specialist	CORE
3.4	3.4	Subject Matter Expertise								
3.4	3.4.1	Provide SME when requested by the COR to include but not limited to participation in and review of Management and Operating (M&O) and Management and Integration (M&I) training products and the training process. The SME must have knowledge of curriculum development, training resources,..... and training evaluation methodology to verify implementation of effective training programs and employee application of skills and knowledge on-the-job.	No. of Hours	N/A	N/A	230.00	GS-201	12	Corporate Training Specialist	CORE
3.4	3.4.1	Same as Above	No. of Hours	N/A	N/A	100.00	GS-201	13	Corporate Training Officer	CORE
3.4	3.4.1	Same as Above	No. of Hours	N/A	N/A	165.00	GS-201	12	Human Resources Specialist	WOC

FA	PWS Para. No.	Description	Unit of Measure	Freq- uency	Time per Task	Required Hrs.*	Series	Grade	Position	Location
3.4	3.4.1	Same as Above	No. of Hours	N/A	N/A	165.00	GS-201	12	Human Resources Specialist	AOC
3.4	3.4.1	Same as Above	No. of Hours	N/A	N/A	230.00	GS-201	12	Human Resources Liaison	SAV RVR
3.4	3.4.1	Same as Above	No. of Hours	N/A	N/A	230.00	GS-201	12	Human Resources Liaison	CHICAGO
3.4	3.4.1	Same as Above	No. of Hours	N/A	N/A	230.00	GS-201	12	Human Resources Liaison	RICH
3.4	3.4.1	Same as Above	No. of Hours	N/A	N/A	230.00	GS-201	12	Human Resources Liaison	OAK RIDGE
3.4	3.4.1	Same as Above	No. of Hours	N/A	N/A	230.00	GS-201	12	Human Resources Liaison	IDAHO
3.4	3.4.2	Provide SME on Management and Operating (M&O) and Management and Integration (M&I) contractor-related training when requested by the COR to include but not limited to establishing performance measures and performance indicators; perform line and independent evaluations of training program sufficiency and assess compliance with applicable requirements (e.g. rules, regulatory standards, contract terms). Provide a report to the COR on evaluations within three working days of request.	No. of Hours	N/A	N/A	200.00	GS-201	12	Corporate Training Specialist	CORE
3.4	3.4.2	Same as Above	No. of Hours	N/A	N/A	168.00	GS-201	13	Corporate Training Officer	CORE
3.4	3.4.2	Same as Above	No. of Hours	N/A	N/A	325.00	GS-201	12	Human Resources Specialist	WOC
3.4	3.4.2	Same as Above	No. of Hours	N/A	N/A	325.00	GS-201	12	Human Resources Specialist	AOC
3.4	3.4.2	Same as Above	No. of Hours	N/A	N/A	370.00	GS-201	12	Human Resources Liaison	SAV RVR
3.4	3.4.2	Same as Above	No. of Hours	N/A	N/A	370.00	GS-201	12	Human Resources Liaison	CHICAGO
3.4	3.4.2	Same as Above	No. of Hours	N/A	N/A	370.00	GS-201	12	Human Resources Liaison	RICH
3.4	3.4.2	Same as Above	No. of Hours	N/A	N/A	370.00	GS-201	12	Human Resources Liaison	OAK RIDGE

FA	PWS Para. No.	Description	Unit of Measure	Freq- uency	Time per Task	Required Hrs.*	Series	Grade	Position	Location
3.4	3.4.2	Same as Above	No. of Hours	N/A	N/A	370.00	GS-201	12	Human Resources Liaison	IDAHO
3.4	3.4.3	Provide SME on training related systems and issues to include but not limited to CHRIS, Knowledge Management, Succession Planning, and DOE Corporate Business Plan.	No. of Instances	N/A	N/A	150.00	GS-201	13	Corporate Training Officer	CORE
3.5	3.5	Employee Development								
3.5	3.5.1	Manage, administer, & maintain existing Career and Developmental programs described in Appendix K: Career Development Programs, to include but not limited to recs for improvements, coordination, planning, resource management, needs assessment, design, delivery, and assignment of responsibilities in accordance with DOE M 360.1-1B, Chap. II. Submit recommendations for improvements at least annually to the COR.								
3.5	3.5.2	Ensure development of new Career Programs as requested by the COR to include but not limited to providing recommendations on development, coordination, planning, resource management, needs assessment, design, delivery, and assignment of responsibilities in accordance with DOE Manual 360.1-1B, Chapter II.								
3.5	3.5.3	Recommend new Career Programs based upon needs assessment as described in section 3.1 to include but not limited to providing recommendations on development, coordination, planning, resource management, needs assessment, design, delivery, and assignment of responsibilities in accordance with DOE Manual 360.1-1B, Chapter II.								
3.6	3.6	Technical Qualification Program Support								
3.6	3.6.1	Provide support to the FTCP in managing and administering the existing TQP to include but not limited to maintenance of standards, quarterly reporting of qualification status, annual documentation of critical skills inventory, and identification and documentation of facility specific requirements as related to functional areas in accordance with DOE Manual 360.1-1B, Chap. V and DOE M 426.1, FTC Manual, Section 4b. The report on qualification status shall be submitted to the COR 15 working days after the end of each quarter.	No. of Hours	N/A	N/A	578.60	GS-201	13	TQP Manager	CORE
3.6	3.6.1	Same as Above	No. of Hours	N/A	N/A	500.00	GS-201	12	Human Resources Specialist (TQP)	WOC

FA	PWS Para. No.	Description	Unit of Measure	Freq- uency	Time per Task	Required Hrs.*	Series	Grade	Position	Location
3.6	3.6.1	Same as Above	No. of Hours	N/A	N/A	500.00	GS-201	12	Human Resources Specialist (TQP)	AOC
3.6	3.6.2	Ensure development of new qualification standards as requested by the COR to include but not limited to providing recommendations on development, coordination, planning, and assignment of responsibilities in accordance with DOE Manual 360.1-1B, Chapter V. Submit standards update recommendations for no more than 40 percent of functional area and 30 percent of facility specific qualification standards by September 30 of each year.	No. of Hours	N/A	N/A	300.00	GS-201	13	TQP Manager	CORE
3.6	3.6.3	Develop and deliver to the employee TQP qualification cards that reflect competencies stated in general technical, assigned functional area, and assigned facility specific qualification standard(s). TQP qualification card validation of completeness and issuance of TQP certificate cards shall be completed within ten working days of official receipt of completion.	No. of TQP Cards	925	4.69	4,338.25	GS-203	07	Human Resources Assistant	AOC
3.6	3.6.3	Same as Above	No. of TQP Cards	475	4.69	2,227.75	GS-203	07	Human Resources Assistant	WOC
4	4.0	PERSONNEL REQUIREMENTS								
4	4.1- 4.1.5.6	Key Personnel								
5	5.0	GENERAL REQUIREMENTS								
5.1	5.1	Quality Control Plan								
5.1	5.1.1	The SP shall develop and maintain a Quality Control (QC) Plan. This document must be updated as needed or as directed by the COR. Each document and revisions thereto, shall be provided to the COR for review and approval.	No. of Hours	N/A	N/A	100.00	GS-201	13	Quality Control Management POC	CORE
5.1	5.1.2	The QC Plan must identify procedures the SP shall use to ensure performance is at least as good as the standards identified in Appendix F: PRS & requirements in paragraph 5.3. Quality Control. All employees shall be trained in relevant parts of the QC Plan.	Directives -- not to be quantified							
5.1	5.1.3	The QC Plan shall include a customer comments and complaints program and processing system. The QC Plan shall allow identification and correction of validated customer complaints and provide feedback to the Government and customers on corrective action(s) taken. The term "customer" refers to customers internal and external to the organizations	No. of Hours	N/A	N/A	400.00	GS-201	13	Quality Control Management POC	CORE

FA	PWS Para. No.	Description	Unit of Measure	Freq- uency	Time per Task	Required Hrs.*	Series	Grade	Position	Location
		identified by this contract.								
5.1	5.1.4	The SP shall maintain a file of all inspections or samplings conducted by the SP, including corrective actions taken. This file shall be subject to COR review upon request. The file shall be the property of the Government and shall be turned over to the Government upon completion or termination of the contract.	No. of Hours	N/A	N/A	200.00	GS-201	13	Quality Control Management POC	CORE
5.2	5.2	Quality Control								
5.2	5.2.1	The SP shall be responsible for the quality of all work under this contract.								
5.2	5.2.2	The SP QC program shall ensure that all aspects of this contract are performed in compliance with contract requirements, and shall contain a plan for corrective action when deficiencies or insufficient performance are identified. When defective performance is noted through QA activities, the COR will request that the SP correct the defective performance, or provide a plan for corrective action. The SP shall respond to this request in writing within two business days of receipt.	No. of Hours	N/A	N/A	300.00	GS-201	13	Quality Control Management POC	CORE
5.2	5.2.3	Critical aspects of the SP's quality control program include management of workforce members, subcontractors, and all other affiliates.								
5.3	5.3	Personnel Security								
5.3	5.3.1	Upon request, the Service Provider shall submit to the Government the name and addresses of each employee hired for work on this contract, and the name and address of each subcontractor, as well as provide completed security questionnaires and other forms when required for security purposes.								
5.3	5.3.2	Due to the nature and location of work to be performed under this contract, specified Service Provider personnel shall possess or be able to obtain security clearances.								

FA	PWS Para. No.	Description	Unit of Measure	Freq- uency	Time per Task	Required Hrs.*	Series	Grade	Position	Location
5.3	5.3.2.1	A personnel security clearance is neither a license for access to classified information nor a substitute for security measures designed to prevent unauthorized access. Therefore, security clearances are only to be granted when there is a bona fide requirement for access to classified information in performance of duty assignment. For access to DOE sites, SP shall obtain Building Access Only (BAO) security identification cards. At least two of the SP's personnel shall possess or be able to obtain a Security Clearance Level Q to perform the subject matter expert tasks.								Not Applicable-but cost implications
5.3	5.3.2.2	The SP shall ensure government debriefings are conducted for departing employees in accordance with DOE Order 470.1, Security Operations								Directives -- not to be quantified
5.3	5.3.2.3	The SP possesses or is able to obtain a Facility Clearance for any on-site facilities it elects to use for performance of this contract.								Directives -- not to be quantified
5.4	5.4	Information Security								
5.4	5.4.1	The SP shall comply with disclosure of information in accordance with DOE Order 470.1, Security Operations.								Directives -- not to be quantified
5.4	5.4.1.1	Neither the SP nor any of its employees or affiliates shall disclose or cause to be disseminated any information concerning operations of the activity which could result in (or increase the likelihood or possibility of) a breach of the activity's security, or interrupt the continuity of its operations.								Directives -- not to be quantified
5.4	5.4.1.2	Disclosure of information relating to the services hereunder to any person not entitled to receive it, or failure to safeguard any sensitive or classified information that may come to the SP or any person under his/her control in connection with work under this contract, may subject the SP, his/her agents, or employees to criminal liability.								Directives -- not to be quantified
5.4	5.4.1.3	All inquiries, comments, or complaints arising from any matter observed, experienced, or learned as a result of, or in connection with, performance of this contract shall be directed to the Government.								Directives -- not to be quantified
5.4	5.4.1.4	Deviations from, or violations of, any provisions of this section may, in addition to all other criminal and civil remedies provided by law, subject the SP to possible termination for default and/or subject the individuals involved to withdrawal of the Government's acceptance and approval of employment.								Directives -- not to be quantified

FA	PWS Para. No.	Description	Unit of Measure	Freq- uency	Time per Task	Required Hrs.*	Series	Grade	Position	Location
5.5	5.5	Meetings								
5.5		The SP's Program Manager (and other personnel the SP designates) shall be required to attend status or performance meetings as follows:								
5.5	5.5.1	Routine operational meetings, conference calls, and discussions will be held at least monthly by Televideo conference to answer questions and resolve issues as they arise, and to ensure continued compliance with contract requirements.	No. of Hours	Monthly	N/A	48.00	GS-201	14	Project Mgr.	CORE
5.5	5.5.1	See Above	No. of Hours	Monthly	N/A	48.00	GS-201	13	Deputy Project Manager	WOC
5.5	5.5.1	See Above	No. of Hours	Monthly	N/A	48.00	GS-201	13	Deputy Project Manager	AOC
5.5	5.5.1	See Above	No. of Hours	Monthly	N/A	48.00	GS-201	12	Corporate Training Specialist	CORE
5.5	5.5.1	See Above	No. of Hours	Monthly	N/A	48.00	GS-201	13	Corporate Training Officer	CORE
5.5	5.5.2	During the 1st quarter of the Full Performance Base Period of the contract, performance meetings will be conducted as performance warrants and may occur weekly via teleconference or videoconference. The COR will determine at what point performance meetings will occur less frequently and when face-to-face meetings are necessary. Performance meetings will be conducted after the end of each quarter at a HQ DOE Office to discuss performance under the contract.	No. of Hours	Weekly	N/A	30.00	GS-201	12	Corporate Training Specialist	CORE
5.5	5.5.2	See Above	No. of Hours	Weekly	N/A	30.00	GS-201	13	Corporate Training Officer	CORE
5.5	5.5.2	See Above	No. of Hours	Weekly	N/A	30.00	GS-201	14	Project Mgr.	CORE
5.5	5.5.3	The Service Provider shall take minutes at the kick-off, progress, and performance review meetings and shall provide copies to the COR and other attendees.	No. of Hours	As Needed	N/A	12.00	GS-201	12	Corporate Training Specialist	CORE
5.5	5.5.3	See Above	No. of Hours	As Needed	N/A	12.00	GS-201	12	Corporate Training Specialist	CORE
5.5	5.5.3	See Above	No. of Hours	As Needed	N/A	12.00	GS-201	13	Corporate Training Officer	CORE
5.5	5.5.3	See Above	No. of Hours	As Needed	N/A	12.00	GS-201	14	Project Mgr.	CORE

FA	PWS Para. No.	Description	Unit of Measure	Freq- uency	Time per Task	Required Hrs.*	Series	Grade	Position	Location
5.6	5.6	<i>Business Hours:</i> Normal business hours for each location are from 8:00 a.m. to 5:00 p.m. local time, five days per week, Monday through Friday, except recognized Federal holidays.	Directives -- not to be quantified							
5.7	5.7	Compliance								
5.7		The SP and SP employees shall abide by all applicable Federal, State, and local laws and regulations, as prescribed in applicable directives listed in Appendix I: Publications and Forms while engaged in the performance of all operations associated with this contract.	Directives -- not to be quantified							
5.7	5.7.1	Where the SP has elected to use Government space, it shall provide access to that Government space and cooperate with visiting Government personnel conducting official inspection visits and surveys at the site.	Directives -- not to be quantified							
5.7	5.7.2	Scheduled Visits: The SP shall notify the COR of scheduled inspection visits, investigation, or corrective actions required by Federal, State, local or other inspection agencies or offices.	Directives -- not to be quantified							
5.7	5.7.3	Unscheduled Visits: The SP shall notify the COR by phone within 30 minutes of unannounced arrival of any agents of any regulatory agency. The COR will provide instructions to the SP.	Directives -- not to be quantified							
5.7	5.7.4	Inspection Documentation: The SP shall maintain on file documentation of all inspections and visits, to include names, identification numbers, agencies of the inspectors, reasons for the visit, and any remarks made during the visit.	Not Applicable							
5.9	5.9	Data and Information Access								
5.9	5.9.1	SP shall ensure that information generated by the SP in performance of this contract to include but not limited to, technical records, reports, files, magnetic media, and other documentation are available to the COR at all times during performance of this contract.	Directives -- not to be quantified							
5.9	5.9.2	No information developed by the SP concerning performance of this contract shall be proprietary; the Government will have unlimited rights to all data.	Directives -- not to be quantified							
5.9	5.9.3	The Public Affairs Office (PAO) or equivalent is the only source for release information to the media.	Directives -- not to be quantified							

FA	PWS Para. No.	Description	Unit of Measure	Freq- uency	Time per Task	Required Hrs.*	Series	Grade	Position	Location
5.9	5.9.4	Disclosure of information relating to services hereunder to persons not entitled to receive it, or failure to safeguard classified information or controlled unclassified information that may come to the SP or persons under its control in connection with work under this contract, may subject the SP, its agents, and or employees to criminal liability under 18 USC.								
5.9	5.9.5	All inquiries, comments, or complaints arising from matters observed, experienced or learned as a result of or in connection with, performance of this contract that may require dissemination of official information shall be referred to the COR.								
5.10	5.10	Library Maintenance: During the base period and each option year of the contract, the SP shall update a library that shall include, but not be limited to, a copy of all monthly reports for that period, a copy of all annual reports of the contract period, and a copy of one-time deliverables.	No. of Hours	As Needed	N/A	120.00	GS-203	07	Administrative Assistant	CORE
		REPORTS								
2.1	2.1.2, 2.1.3	Policy Recommendations	No. of Reports	At least annually		100.00	GS-201	13	Corporate Training Officer	CORE
2.1	2.1.6	Annual Training Plan	No. of Reports	Annually		125.00	GS-201	12	Corporate Training Specialist	CORE
3.1	3.1.1, 3.1.3	Annual and ad hoc needs assessments	No. of Reports	Annually and as required		145.00	GS-201	12	Corporate Training Specialist	CORE
3.2	3.2.17	Employee and Supervisor Feedback on Training Adequacy	No. of Reports	Quarterly		110.00	GS-201	13	Quality Control Management POC	CORE
3.2	3.2.17	Same as Above	No. of Reports	Quarterly		45.00	GS-201	12	Human Resources Specialist	WOC
3.2	3.2.17	Same as Above	No. of Reports	Quarterly		45.00	GS-201	12	Human Resources Specialist	AOC
3.3	3.3.9	Customer Service Reports on Student Data	No. of Reports	Monthly and Year-to-date	N/A	54.00	GS-201	09/11	Human Resources Specialist (Team Lead)	WOC
3.3	3.3.9	Same as Above	No. of Reports	Monthly and Year-to-	N/A	54.00	GS-201	09/11	Human Resources Specialist (Team Lead)	AOC

FA	PWS Para. No.	Description	Unit of Measure	Freq- uency	Time per Task	Required Hrs.*	Series	Grade	Position	Location
				date						
3.3	3.3.10	Optimum Student/Attendee Enrollment/Attendance	No. of Reports	Annually	N/A	30.00	GS-201	09/11	Human Resources Specialist (Team Lead)	WOC
3.3	3.3.10	Same as Above	No. of Reports	Annually	N/A	30.00	GS-201	09/11	Human Resources Specialist (Team Lead)	AOC
3.3	3.3.19	DOE Training Working Capital Fund Draft Reports	No. of Reports	Quarterly		32.00	GS-201	12	Corporate Training Specialist	CORE
3.4	3.4.2	Subject Matter Expertise Report	No. of Reports	61	1.1	67.10	GS-201	12	Corporate Training Specialist	CORE
3.5	3.5	Program and Course Evaluation Analysis	No. of Reports	Annually		264.60	GS-201	12	Corporate Training Specialist	CORE
3.6	3.6.1	Report on Qualification Status	No. of Reports	Quarterly		80.00	GS-201	13	TQP Manager	CORE
3.6	3.6.1	Report on Qualification Status	No. of Reports	Quarterly		161.00	GS-201	12	Human Resources Specialist (TQP)	WOC
3.6	3.6.1	Report on Qualification Status	No. of Reports	Quarterly		161.00	GS-201	12	Human Resources Specialist (TQP)	AOC
3.6	3.6.2	Standards Update Recommendations	No. of Reports	Annually		22.00	GS-201	13	TQP Manager	CORE
3.6	3.6.2	Other Ad hoc Reports	No. of Reports	Annually		146.00	GS-201	12	Human Resources Specialist (TQP)	WOC
3.6	3.6.2	Same as Above	No. of Reports	Annually		146.00	GS-201	12	Human Resources Specialist (TQP)	AOC
CAREER DEVELOPMENT PROGRAMS										
3.5	3.5.1	Senior Executive Service Candidate Development Program	Hours per Year	N/A	N/A	132.00	GS-201	13	Corporate Training Officer	CORE
3.5	3.5.1	Senior Executive Service Candidate Development Program	Hours per Year	N/A	N/A	132.00	GS-201	12	Human Resources Specialist	WOC
3.5	3.5.1	Senior Executive Service Candidate Development Program	Hours per Year	N/A	N/A	132.00	GS-201	12	Human Resources Specialist	AOC
3.5	3.5.1	DOE Mentoring Program	Hours per Year	N/A	N/A	504.00	GS-201	12	Human Resources Specialist	WOC

FA	PWS Para. No.	Description	Unit of Measure	Freq- uency	Time per Task	Required Hrs.*	Series	Grade	Position	Location
3.5	3.5.1	Professional Skills Training Program (PS)	Hours per Year	N/A	N/A	487.00	GS-201	12	Human Resources Specialist	WOC
3.5	3.5.1	Acquisition Career Development Program	Hours per Year	N/A	N/A	30.00	GS-201	12	Corporate Training Specialist	CORE
3.5	3.5.1	Acquisition Career Development Program	Hours per Year	N/A	N/A	175.00	GS-201	12	Human Resources Specialist	WOC
3.5	3.5.1	Acquisition Career Development Program	Hours per Year	N/A	N/A	175.00	GS-201	12	Human Resources Specialist	AOC
3.5	3.5.1	Program Management	Hours per Year	N/A	N/A	115.00	GS-201	12	Corporate Training Specialist	CORE
3.5	3.5.1	Program Management	Hours per Year	N/A	N/A	90.00	GS-201	12	Human Resources Specialist	WOC
3.5	3.5.1	Program Management	Hours per Year	N/A	N/A	90.00	GS-201	12	Human Resources Specialist	AOC
3.5	3.5.1	Project Management	Hours per Year	N/A	N/A	141.00	GS-201	12	Corporate Training Specialist	CORE
3.5	3.5.1	Project Management	Hours per Year	N/A	N/A	83.00	GS-201	12	Human Resources Specialist	WOC
3.5	3.5.1	Project Management	Hours per Year	N/A	N/A	83.00	GS-201	12	Human Resources Specialist	AOC
3.5	3.5.1	Georgetown University's Government Affairs Institute, Capitol Hill Fellowship Program	Hours per Year	N/A	N/A	22.00	GS-201	12	Corporate Training Specialist	CORE
3.5	3.5.1	Commerce Science and Technology Fellowship (COMSCI) Program	Hours per Year	N/A	N/A	42.00	GS-201	12	Corporate Training Specialist	CORE
3.5	3.5.1	U.S. Department of Agriculture (USDA) Graduate School, Congressional Fellowship Program	Hours per Year	N/A	N/A	106.00	GS-201	12	Corporate Training Specialist	CORE
3.5	3.5.1	The Council for Excellence in Government, Excellence in Government Fellows Program	Hours per Year	N/A	N/A	42.00	GS-201	12	Corporate Training Specialist	CORE
3.5	3.5.1	The Brookings Institution Government Affairs Institute, Legislative Fellows Program	Hours per Year	N/A	N/A	35.00	GS-201	12	Corporate Training Specialist	CORE
3.5	3.5.1	The Mansfield Center for Pacific Affairs and the USIA, Mike Mansfield Fellowship Program	Hours per Year	N/A	N/A	66.00	GS-201	12	Corporate Training Specialist	CORE
3.5	3.5.1	Harvard University, Senior Executive Fellows Program	Hours per Year	N/A	N/A	54.00	GS-201	12	Corporate Training Specialist	CORE

FA	PWS Para. No.	Description	Unit of Measure	Freq- uency	Time per Task	Required Hrs.*	Series	Grade	Position	Location
3.5	3.5.1	National Security Studies Program (NSSP)	Hours per Year	N/A	N/A	74.00	GS-201	12	Corporate Training Specialist	CORE
3.5	3.5.1	DOE Executive Potential Program (GS-13 to GS-15)	Hours per Year	N/A	N/A	300.00	GS-201	12	Human Resources Specialist	WOC
3.5	3.5.1	DOE Executive Potential Program (GS-13 to GS-15)	Hours per Year	N/A	N/A	196.00	GS-201	12	Human Resources Specialist	AOC
3.5	3.5.1	DOE Executive Leadership Program for Mid-Level Employees (GS-11 to GS-13)	Hours per Year	N/A	N/A	110.00	GS-201	12	Human Resources Specialist	WOC
3.5	3.5.1	DOE Executive Leadership Program for Mid-Level Employees (GS-11 to GS-13)	Hours per Year	N/A	N/A	110.00	GS-201	12	Human Resources Specialist	AOC
3.5	3.5.1	DOE New Leader Program (GS-7 to GS-11)	Hours per Year	N/A	N/A	126.00	GS-201	12	Human Resources Specialist	WOC
3.5	3.5.1	DOE New Leader Program (GS-7 to GS-11)	Hours per Year	N/A	N/A	126.00	GS-201	12	Human Resources Specialist	AOC
3.5	3.5.1	DOE Aspiring Leader Program (GS-5/6/7)	Hours per Year	N/A	N/A	100.00	GS-201	12	Human Resources Specialist	WOC
3.5	3.5.1	DOE Aspiring Leader Program (GS-5/6/7)	Hours per Year	N/A	N/A	100.00	GS-201	12	Human Resources Specialist	AOC
3.5	3.5.1	Career Intern Program (CIP)	Hours per Year	N/A	N/A	300.00	GS-201	12	Corporate Training Specialist	CORE
3.5	3.5.1	Career Intern Program (CIP)	Hours per Year	N/A	N/A	166.00	GS-201	12	Human Resources Specialist	WOC
3.5	3.5.1	Career Intern Program (CIP)	Hours per Year	N/A	N/A	166.00	GS-201	12	Human Resources Specialist	AOC
3.5	3.5.1	Technical Qualification Program	Hours per Year	N/A	N/A	600.00	GS-201	13	TQP Manager	CORE
3.5	3.5.1	Technical Qualification Program	Hours per Year	N/A	N/A	440.00	GS-201	12	Human Resources Specialist (TQP)	WOC
3.5	3.5.1	Technical Qualification Program	Hours per Year	N/A	N/A	600.00	GS-201	12	Human Resources Specialist (TQP)	AOC
3.5	3.5.2	Recommend new Career Programs based upon needs assessment	Hours per Year	N/A	N/A	185.00	GS-201	13	Corporate Training Officer	CORE
3.5	3.5.3	Develop new Career Programs	Hours per Year	N/A	N/A	315.00	GS-201	13	Corporate Training Officer	CORE

FA	PWS Para. No.	Description	Unit of Measure	Freq- uency	Time per Task	Required Hrs.*	Series	Grade	Position	Location
3.5	3.5.1-3	CAREER DEVELOPMENT PROGRAMS (for Liaisons)	Hours per Year	N/A	N/A	(1,000.00)	GS-201	12	Human Resources Specialist	WOC
3.5	3.5.1-3	CAREER DEVELOPMENT PROGRAMS (for Liaisons)	Hours per Year	N/A	N/A	(1,000.00)	GS-201	12	Human Resources Specialist	AOC
3.5	3.5.1-3	CAREER DEVELOPMENT PROGRAMS (for Liaisons)	Hours per Year	N/A	N/A	400.00	GS-201	12	Human Resources Liaison	SAV RVR
3.5	3.5.1-3	CAREER DEVELOPMENT PROGRAMS (for Liaisons)	Hours per Year	N/A	N/A	400.00	GS-201	12	Human Resources Liaison	CHICAGO
3.5	3.5.1-3	CAREER DEVELOPMENT PROGRAMS (for Liaisons)	Hours per Year	N/A	N/A	400.00	GS-201	12	Human Resources Liaison	RICH
3.5	3.5.1-3	CAREER DEVELOPMENT PROGRAMS (for Liaisons)	Hours per Year	N/A	N/A	400.00	GS-201	12	Human Resources Liaison	OAK RIDGE
3.5	3.5.1-3	CAREER DEVELOPMENT PROGRAMS (for Liaisons)	Hours per Year	N/A	N/A	400.00	GS-201	12	Human Resources Liaison	IDAHO
					Hours	86,852.7				
		* Required hours are converted to unadjusted FTE and explained in Appendix D								

APPENDIX C-2
SOURCE AND USE OF DATA IN APPENDIX C-1

The survey referred to was created by the MEO Team to capture tasks times and workload of affected staff. The 66 responses reviewed served as the basis for certain workload categories -- when not provided by the PWS -- and for developing tasks times or total required hours for a task.

PWS Paragraph Number	Tasks Time and Required Hours	Workload Notes
2.1		
2.1.1	Time per Task based on Technical Estimate Survey averages of respondents	Workload based on number of elements in App. A.
2.1.2	See Above	Workload based on extrapolation from Survey Respondents
2.1.4	See Above	See Above
2.1.5	Professional Estimates of MEO Team	Professional Estimates of MEO Team
2.1.6	Cumulative hours of those survey respondents who answered item and supplied valid hours.	Based on one annual training plan
2.1.7	See Above	Workload based on number of elements in App. A.
3.1		
3.1.1	Time per Task based on Technical Estimate Survey averages of respondents	Workload based on number of elements in App. A.
Add'l	See Above	Based on and est. 50% of potential IDPs being present for review. This percentage based on MEO Team interviews.
3.1.2	Professional Estimates of MEO Team	Professional Estimates of MEO Team
3.1.3	Time per Task based on Technical Estimate Survey averages of respondents	Professional Estimates of MEO Team
3.2		

PWS Paragraph Number	Tasks Time and Required Hours	Workload Notes
3.2.2	Time per Task based on Technical Estimate Survey averages of respondents	Course number determined from review and analysis of PWS App. B. Courses coded and standardized to get unduplicated course titles
3.2.3	See Above	See Above
3.2.4	See Above	See Above
3.2.5	Time per Task based on Technical Estimate Survey averages of respondents	Course number determined from review and analysis of PWS App. B. Courses coded and standardized to get unduplicated course titles
3.2.6	See Above	See Above
3.2.7	See Above	See Above
3.2.8	See Above	See Above
3.2.9	See Above	See Above
3.2.10	See Above	See Above
3.2.11	See Above	See Above
3.2.13	See Above	See Above
3.2.14	See Above	See Above
3.2.16	Time per Task based on Technical Estimate Survey averages of respondents	Based on Estimate of MEO Team of 5% of courses needed market surveys
3.2.16.1	Professional Estimates of MEO Team	Professional Estimates of MEO Team
3.2.17	Professional Estimates of MEO Team	Based on 30% of all instances reviewed, an estimate of the current percentage.
3.2.19	Time per Task based on Technical Estimate Survey averages of respondents	Workload based on extrapolation from Survey Respondents
3.2.20	See Above	Workload based on extrapolation from Survey Respondents divided by proportion of course at each location.
3.3		

PWS Paragraph Number	Tasks Time and Required Hours	Workload Notes
3.3.2	Time per Task based on Technical Estimate Survey averages of respondents	Training Instances from review and analysis of PWS App. B. Course divided by new org. responsible for the course and instances.
3.3.3	Time per Task based on Technical Estimate Survey averages of respondents	Training Instances from review and analysis of PWS App. B. Course divided by new org. responsible for the course and instances.
3.3.4	Time per Task based on Technical Estimate Survey averages of respondents	Course number determined from review and analysis of PWS App. B. Courses coded and standardized to get unduplicated course titles
3.3.5	Time per Task based on Technical Estimate Survey averages of respondents	Workload based on extrapolation from Survey Respondents
Add'l	See Above	See Above
3.3.6	Time per Task based on Technical Estimate Survey averages of respondents	Course number determined from review and analysis of PWS App. B. Courses coded and standardized to get unduplicated course titles
3.3.8	Time per Task based on Technical Estimate Survey averages of respondents	Training Instances from review and analysis of PWS App. B. Course divided by new org. responsible for the course and instances.
3.3.9	See Above	Based on estimate of 6 per element annually
3.3.10	Professional Estimates of MEO Team based on 2 times per HQ organization (element) and 4 times per Field Organization (element).	Workload based on extrapolation from Survey Respondents
3.3.11	Time per Task based on Technical Estimate Survey averages of respondents	Workload based on extrapolation from Survey Respondents
3.3.12	Time per Task based on Technical Estimate Survey averages of respondents	Based on total of regular and mandatory courses (excludes academic, conference, CBT, correspondence)
3.3.13	Time per Task based on Technical Estimate Survey averages of respondents	Based on total of regular and mandatory courses (excludes academic, conference, CBT, correspondence)
3.3.14	Time per Task based on Technical Estimate Survey averages of respondents	Estimate on number of providers by location.

PWS Paragraph Number	Tasks Time and Required Hours	Workload Notes
3.3.15	Based on estimate by MEO Team of 10 staff by 123.8 hours (the total reported hours for this task)	N/A
3.3.17.1	Professional Estimates of MEO Team	Professional Estimates of MEO Team
3.3.17.2	See Above	See Above
3.3.17.3	Hours extrapolated from respondents for this tasks category.	N/A
3.3.18	Time per Task based on Technical Estimate Survey averages of respondents	Professional Estimates of MEO Team
3.3.19	Professional Estimates of MEO Team	Professional Estimates of MEO Team
3.4		
3.4.1	Hours extrapolated from respondents for this tasks category.	N/A
3.4.2	Hours extrapolated from respondents for this tasks category.	N/A
3.4.3	Hours extrapolated from respondents for this tasks category.	N/A
3.6		
3.6.1	Hours based on Survey reported hours and the knowledge that approx. 25% of TQP activities are outside scope	N/A
3.6.2	Hours based on Survey reported hours and the knowledge that approx. 25% of TQP activities are outside scope	N/A
3.6.3	Time per Task based on Technical Estimate Survey averages of respondents	Professional Estimates of MEO Team
5.1		
5.1.1	Professional Estimates of MEO Team	Professional Estimates of MEO Team
5.1.3	Professional Estimates of MEO Team	Professional Estimates of MEO Team
5.1.4	Professional Estimates of MEO Team	Professional Estimates of MEO Team

PWS Paragraph Number	Tasks Time and Required Hours	Workload Notes
5.2		
5.2.2	Professional Estimates of MEO Team	Professional Estimates of MEO Team
5.5		
5.5.1	Professional Estimates of MEO Team	Quantity and frequency provided in the PWS
5.5.2	Professional Estimates of MEO Team	Quantity and frequency provided in the PWS
5.5.3	Professional Estimates of MEO Team	N/A
5.10	Professional Estimates of MEO Team	N/A
2.1.2, 2.1.3	Hours extrapolated from respondents for this tasks category.	N/A
2.1.6	See Above	N/A
3.1.1, 3.1.3	See Above	N/A
3.2.17	Hours extrapolated from respondents for this tasks category.	N/A
3.3.9	See Above	N/A
3.3.10	See Above	N/A
3.3.19	See Above	N/A
3.4.2	See Above	N/A
3.5	See Above	N/A
3.6.1	See Above	N/A
3.6.2	See Above	N/A
3.6.2	See Above	N/A
3.5.1	Total hours from survey respondents divided by three locations with activity	N/A
3.5.1	Total hours from survey respondents divided by three locations with activity	N/A

PWS Paragraph Number	Tasks Time and Required Hours	Workload Notes
3.5.1	See Above	N/A
3.5.1	See Above	N/A
3.5.1	See Above	N/A
3.5.1	MEO adjusted hours based on professional experiences	MEO adjusted hours based on professional experiences
3.5.1	MEO adjusted hours based on professional experiences	MEO adjusted hours based on professional experiences
3.5.1	See Above	N/A
3.5.1	See Above	N/A
3.5.1	See Above	N/A
3.5.1	See Above	N/A
3.5.1	See Above	N/A
3.5.1	See Above	N/A
3.5.1	See Above	N/A
3.5.1	See Above	N/A
3.5.1	See Above	N/A
3.5.1	See Above	N/A
3.5.1	See Above	N/A
3.5.1	See Above	N/A
3.5.1	See Above	N/A
3.5.1	See Above	N/A
3.5.1	See Above	N/A
3.5.1	See Above	N/A
3.5.1	See Above	N/A
3.5.1	Hours extrapolated from respondents for this tasks category.	N/A
3.5.2	See Above	N/A
3.5.3	See Above	N/A

APPENDIX D

MEO STAFFING FROM UNADJUSTED HOURS TO UNADJUSTED FTES TO ACTUAL FTES

As Agency Tender Appendix C-1 shows, the required hours for most tasks was determined by multiplying a workload count by how long it took to perform that particular task. Technical estimates were used as the primary basis to determine the required time per task. The required hours for other staffing requirements were determined by estimating the hours required to perform the task. In both cases, the total required hours were generated. These hours are referred to as "unadjusted hours" (shown below), which are the raw and basic hours to perform the task. The unadjusted hours were divided by 1,776 (hours) to determine the number of unadjusted FTE (see table below). (A-76 guidelines require that Federal staff be determined based on 1,776 productive hours per year.) The MEO is staffed with full FTEs determined by totally the hours to perform each of the PWS tasks. When fractional FTEs resulted the MEO attempted to shift work to create the most reasonable use of that FTE. The resulting staffing is shown below in the Total Adjusted FTE table.

TOTAL UNADJUSTED HOURS BY POSITION FROM APPENDIX C-1

Sum of Required Hrs.			Location								
Position	Series	Grade	AOC	CHICAGO	CORE	IDAHO	OAK RIDGE	RICH	SAV RVR	WOC	Grand Total
Project Mgr.	GS-201	14			90.0						90.0
TQP Manager	GS-201	13			1,580.6						1,580.6
General Clerk	GS-203	05	1,236.3							1,236.3	2,472.6
Human Resources Specialist	GS-201	11	3,273.5							5,026.4	8,299.9
		12	1,676.1							4,410.3	6,086.4
		09/11	5,257.5							7,200.7	12,458.2
Human Resources Liaison	GS-201	12		1,282.9		1,264.5	1,303.0	1,305.7	1,297.5		6,453.6
Corporate Training Officer	GS-201	13			1,766.1						1,766.1
Corporate Training Specialist	GS-201	12			5,057.4						5,057.4
Quality Control Management POC	GS-201	13			1,316.5						1,316.5
Human Resources Assistant	GS-203	07	20,744.1							17,243.2	37,987.3
Human Resources Specialist (Team Lead)	GS-201	09/11	174.1							240.2	414.3
Human Resources Specialist (TQP)	GS-201	12	1,407.0							1,247.0	2,654.0
Deputy Project Manager	GS-201	13	48.0							48.0	96.0
Administrative Assistant	GS-203	07			120.0						120.0
Grand Total			33,816.7	1,282.9	9,930.5	1,264.5	1,303.0	1,305.7	1,297.5	36,652.0	86,852.7

APPENDIX D

MEO STAFFING FROM UNADJUSTED HOURS TO UNADJUSTED FTES TO ACTUAL

TOTAL UNADJUSTED FTE BASED ON UNADJUSTED HOURS

= No Hours

Position	Series	Grade	AOC	CHICAGO	CORE	IDAHO	OAK RIDGE	RICH	SAV RVR	WOC	Grand Total
Project Mgr.	GS-201	14			0.05						0.05
TQP Manager	GS-201	13			0.89						0.89
General Clerk	GS-203	05	0.70							0.70	1.39
Human Resources Specialist	GS-201	11	1.84							2.83	4.67
Human Resources Specialist	GS-201	12	0.94							2.48	3.43
Human Resources Specialist	GS-201	09/11	2.96							4.05	7.01
Human Resources Liaison	GS-201	12		0.72		0.71	0.73	0.74	0.73		3.63
Corporate Training Officer	GS-201	13			0.99						0.99
Corporate Training Specialist	GS-201	12			2.85						2.85
Quality Control Management POC	GS-201	13			0.74						0.74
Human Resources Assistant	GS-203	07	11.68							9.71	21.39
Human Resources Specialist (Team Lead)	GS-201	09/11	0.10							0.14	0.23
Human Resources Specialist (TQP)	GS-201	12	0.79							0.70	1.49
Deputy Project Manager	GS-201	13	0.03							0.03	0.05
Administrative Assistant	GS-203	07			0.07						0.07
Grand Total			19.04	0.72	5.59	0.71	0.73	0.74	0.73	20.64	48.90

TOTAL ADJUSTED FTE*

Position	Series	Grade	AOC	CHICAGO	CORE	IDAHO	OAK RIDGE	RICH	SAV RVR	WOC	Grand Total
Project Mgr.	GS-201	14			1.00						1.00
TQP Manager	GS-201	13			1.00						1.00
General Clerk	GS-203	05	1.00							1.00	2.00
Human Resources Specialist	GS-201	11	2.00							3.00	5.00
Human Resources Specialist	GS-201	12	1.00							3.00	4.00
Human Resources Specialist	GS-201	09/11	3.00							4.00	7.00
Human Resources Liaison	GS-201	12		1.00		1.00	1.00	1.00	1.00		5.00
Corporate Training Officer	GS-201	13			1.00						1.00
Corporate Training Specialist	GS-201	12			3.00						3.00
Quality Control Management POC	GS-201	13			1.00						1.00
Human Resources Assistant	GS-203	07	12.00							10.00	22.00
Human Resources Specialist (Team Lead)	GS-201	09/11	1.00							1.00	2.00
Human Resources Specialist (TQP)	GS-201	12	1.00							1.00	2.00
Deputy Project Manager	GS-201	13	1.00							1.00	2.00
Administrative Assistant	GS-203	07			1.00						1.00
Grand Total			22.00	1.00	8.00	1.00	1.00	1.00	1.00	24.00	59.00

* FTE were adjusted to form full MEO positions and to account for necessary supervision and indirect activities. Adjustments also were made to staff the required positions (key and Core FTEs personnel) discussed in the PWS and Solicitation.

APPENDIX E-1

PRIMARY PWS TASKS BY LOCATION

No.	Location	DOE Elements (from PWS Appendix A)	HQ Core Group	OPERATIONS CENTERS		LIAISON SITES				
				WOC	AOC	Chicago	Idaho	Oak Ridge	Richland	Savannah River
1	Washington, DC	Office of Management, Budget, and Evaluation/CFO	2.1, 3.1, 3.4, 3.5	2.1, 3.1, 3.2, 3.3, 3.4, 3.5						
2	Washington, DC	Office of the Chief Information Officer	2.1, 3.1, 3.4, 3.5	2.1, 3.1, 3.3, 3.4, 3.5						
3	Washington, DC	Office of Congressional and Intergovernmental Affairs	2.1, 3.1, 3.4, 3.5	2.1, 3.1, 3.3, 3.4, 3.5						
4	Washington, DC	Office of Economic Impact and Diversity	2.1, 3.1, 3.4, 3.5	2.1, 3.1, 3.3, 3.4, 3.5						
5	Washington, DC	Office of Energy Efficiency and Renewable Energy	2.1, 3.1, 3.4, 3.5	2.1, 3.1, 3.3, 3.4, 3.5						
6	Golden, CO	Golden Field Office	2.1, 3.1, 3.4, 3.5		2.1, 3.1, 3.3, 3.4, 3.5					
7	Washington, DC	Energy Information Administration	2.1, 3.1, 3.4, 3.5	2.1, 3.1, 3.3, 3.4, 3.5						
8	Washington, DC	Office of General Counsel	2.1, 3.1, 3.4, 3.5	2.1, 3.1, 3.3, 3.4, 3.5						
9	Washington, DC	Office of Hearings and Appeals	2.1, 3.1, 3.4, 3.5	2.1, 3.1, 3.3, 3.4, 3.5						
10	Washington, DC	Office of Independent Oversight and Performance Assurance	2.1, 3.1, 3.4, 3.5	2.1, 3.1, 3.3, 3.4, 3.5						
11	Washington, DC	Office of Policy and International Affairs	2.1, 3.1, 3.4, 3.5	2.1, 3.1, 3.3, 3.4, 3.5						
12	Washington, DC	Office of Public Affairs	2.1, 3.1, 3.4, 3.5	2.1, 3.1, 3.3, 3.4, 3.5						
13	Washington, DC	Office of Worker and Community Transition	2.1, 3.1, 3.4, 3.5	2.1, 3.1, 3.3, 3.4, 3.5						
14	Germantown, MD	Office of Security	2.1, 3.1, 3.4, 3.5	2.1, 3.1, 3.3, 3.4, 3.5						
15	Washington, DC	Under Secretary for Nuclear Security/Administrator for National Nuclear Security Administration (NNSA) Headquarters	2.1, 3.1, 3.4, 3.5	2.1, 3.1, 3.2, 3.3, 3.4, 3.5						
16	Albuquerque, NM	NNSA Albuquerque	2.1, 3.1, 3.4, 3.5, 3.6		2.1, 3.1, 3.2, 3.3, 3.4, 3.5, 3.6					
17	Las Vegas, NV	NNSA NV	2.1, 3.1, 3.4, 3.5, 3.6		2.1, 3.1, 3.2, 3.3, 3.4, 3.5, 3.6					
18	Oakland, CA	NNSA Oakland	2.1, 3.1, 3.4, 3.5, 3.6		2.1, 3.1, 3.2, 3.3, 3.4, 3.5, 3.6					
19	Washington, DC	Assistant Secretary for Environment, Safety and Health	2.1, 3.1, 3.4, 3.5	2.1, 3.1, 3.3, 3.4, 3.5						

No.	Location	DOE Elements (from PWS Appendix A)	HQ		OPERATIONS CENTERS		LIAISON SITES				
			Core Group		WOC	AOC	Chicago	Idaho	Oak Ridge	Richland	Savannah River
20	Washington, DC	Assistant Secretary for Environmental Management	2.1, 3.1, 3.4, 3.5	EM	2.1, 3.1, 3.2, 3.3, 3.4, 3.5						
21	Washington, DC	Assistant Secretary for Fossil Energy	2.1, 3.1, 3.4, 3.5	FE	2.1, 3.1, 3.2, 3.3, 3.4, 3.5						
22	Pittsburgh, PA	National Energy Technology Laboratory, Pittsburgh, PA	2.1, 3.1, 3.4, 3.5	NETL	2.1, 3.1, 3.2, 3.3, 3.4, 3.5						
23	New Orleans, LA	Strategic Petroleum Reserve Project Office, New Orleans, LA	2.1, 3.1, 3.4, 3.5	SPRO	2.1, 3.1, 3.2, 3.3, 3.4, 3.5						
24	Washington, DC	Office of Science	2.1, 3.1, 3.4, 3.5	SC	2.1, 3.1, 3.2, 3.3, 3.4, 3.5						
25	Washington, DC	Office of Civilian Radioactive Waste Management	2.1, 3.1, 3.4, 3.5	RW	2.1, 3.1, 3.2, 3.3, 3.4, 3.5						
26	Washington, DC	Office of Nuclear Energy, Science, and Technology	2.1, 3.1, 3.4, 3.5	NE	2.1, 3.1, 3.2, 3.3, 3.4, 3.5						
27	Chicago, IL	Chicago	2.1, 3.1, 3.4, 3.5	CH	2.1, 3.1, 3.2, 3.3, 3.4, 3.5		3.1, 3.4, 3.5				
	Upton, NY	Brookhaven Area Office	2.1, 3.1, 3.4, 3.5		2.1, 3.1, 3.2, 3.3, 3.4, 3.5		3.1, 3.4, 3.5				
28	Idaho Falls, ID	Idaho	2.1, 3.1, 3.4, 3.5, 3.6	ID		2.1, 3.1, 3.2, 3.3, 3.4, 3.5, 3.6		3.1, 3.4, 3.5			
29	Oak Ridge, TN	Oak Ridge	2.1, 3.1, 3.4, 3.5, 3.6	ORO	2.1, 3.1, 3.2, 3.3, 3.4, 3.5, 3.6				3.1, 3.4, 3.5		
30	Miamisburg, OH	Ohio	2.1, 3.1, 3.4, 3.5	OHIO	2.1, 3.1, 3.2, 3.3, 3.4, 3.5						
31	Golden, CO	Rocky Flats	2.1, 3.1, 3.4, 3.5	RF		2.1, 3.1, 3.2, 3.3, 3.4, 3.5					
32	Richland, WA	Richland	2.1, 3.1, 3.4, 3.5, 3.6	RL		2.1, 3.1, 3.2, 3.3, 3.4, 3.6				3.1, 3.4, 3.5	
33	Aiken, SC	Savannah River	2.1, 3.1, 3.4, 3.5, 3.6	SR	2.1, 3.1, 3.2, 3.3, 3.4, 3.5, 3.6						3.1, 3.4, 3.5

Identifies elements with course instances workload

APPENDIX E-2

PWS TASKS BY PRIMARY AND SECONDARY LOCATION

- X** - Primary responsibility
- x - Secondary responsibility

HQ		OPERATIONS CENTERS			LIAISON SITES					
PWS Paragraph	Core Group	AOC	WOC	Chicago	Idaho	Oak Ridge	Richland	Savannah River		
2.1.1		X	X	X	X	X	X	X		
2.1.2	X	X	X							
2.1.3										
2.1.4	X									
2.1.5	X	X	X							
2.1.6	X									
2.1.7		X	X	X	X	X	X	X		
3.1.1	X	X	X	X	X	X	X	X		
3.1.2	X									
3.1.3	X	X	X							
3.2.1		X	X	X	X	X	X	X		
3.2.2		X	X							
3.2.3		X	X							
3.2.4		X	X							
3.2.5		X	X							
3.2.6		X	X							
3.2.7		X	X							
3.2.8		X	X							
3.2.9		X	X							
3.2.10		X	X							
3.2.11		X	X							
3.2.12		X	X							
3.2.13		X	X							
3.2.14		X	X							
3.2.15										
3.2.16		X	X							
3.2.17	X	X	X							
3.2.18										
3.2.19		X	X							
3.2.20		X	X							
3.3.1		X	X							
3.3.2		X	X							
3.3.3		X	X							

APPENDIX E-2
PWS TASKS BY PRIMARY AND SECONDARY LOCATION

	HQ	OPERATIONS CENTERS			LIAISON SITES				
PWS Paragraph	Core Group	AOC	WOC	Chicago	Idaho	Oak Ridge	Richland	Savannah River	
3.3.4		X	X						
3.3.5		X	X						
3.3.6		X	X						
3.3.7		X	X						
3.3.8		X	X						
3.3.9		X	X						
3.3.10		X	X						
3.3.11		X	X						
3.3.12		X	X						
3.3.13		X	X						
3.3.14		X	X						
3.3.15		X	X						
3.3.16		X	X						
3.3.17	X	X	X						
3.3.18	X	X	X						
3.3.19	X								
3.4.1	X	X	X	X	X	X	X	X	
3.4.2	X	X	X	X	X	X	X	X	
3.4.3	X								
3.5.1	X	X	X	X	X	X	X	X	
3.5.2	X	x	x	x	x	x	x	x	
3.5.3	X	x	x	x	x	x	x	x	
3.6.1	X	X	X						
3.6.2	X	X	X						
3.6.3		X	X						
5.1.1	X								
5.1.3	X								
5.1.4	X								
5.2.2	X								
5.5.1	X	x	x						
5.5.2	X								
5.5.3	X								
5.10	X								

APPENDIX F-1
MATRICES FOR THE LABOR CATEGORIES
BY PWS FUNCTIONAL AREA OF WORK PERFORMED -- SUMMARY

LABOR CATEGORY	GRADE-SERIES	SKILLS TO BE EMPLOYED	NUMBER OF FULL-TIME PERSONNEL FOR THE EFFORT	LOCATION OF EFFORT
DOE Headquarters Core Group				
Project Manager (Supervisory Human Resources Specialist)	GS-201-14	PWS 4.1.2	1.0	Washington, DC
Quality Control Management Point of Contact (Human Resources Specialist)	GS-201-13	PWS 4.1.3	1.0	Washington, DC
Corporate Training Officer (Human Resources Specialist)	GS-201-13	PWS 4.1.4.1	1.0	Washington, DC
Corporate Training Specialist (Human Resources Specialist)	GS-201-12	PWS 4.1.4.2	3.0	Washington, DC
Technical Qualifications Program Manager (Human Resources Specialist)	GS-201-13	PWS 4.1.4.3	1.0	Washington, DC
Administrative Assistant (Human Resources Assistant)	GS-203-07	PWS 5.10 and Indirect Support	1.0	Washington, DC
Washington Operations Center (WOC)				
Deputy Project Manager (Supervisory Human Resources Specialist)	GS-201-13	Supervision and Indirect Support	1.0	Washington, DC
Human Resources Specialist	GS-201-12	PWS 2.1.1-2.1.2, 2.1.5, 2.1.7, 3.1.3, 3.2.17, 3.2.20, 3.4.1-3.4.2, 3.5.1-3.5.3	3.0	Washington, DC
Human Resources Specialist (TQP)	GS-201-12	PWS 3.5.1, 3.6.1-3.6.2	1.0	Washington, DC
Human Resources Specialist	GS-201-11	PWS 3.1.1, 3.2.11, 3.2.16-3.2.17, 3.2.19-3.2.20	3.0	Washington, DC
Human Resources Specialist (Team Lead)	GS-201-09/11	PWS 3.3.9-3.3.10, 3.3.17, Supervision	1.0	Washington, DC
Human Resources Specialist	GS-201-09/11	PWS 3.2.1-3.2.14, 3.3.9, 3.3.17-3.3.18	4.0	Washington, DC
Human Resources Assistant	GS-203-07	PWS 3.3.1-3.3.6, 3.3.8, 3.3.10-3.3.14, 3.3.18, 3.6.3	10.0	Washington, DC
General Clerk (Human Resources Assistant)	GS-203-05	PWS 3.3.15 and Indirect Support	1.0	Washington, DC
Albuquerque Operations Center (AOC)				
Deputy Project Manager (Supervisory Human Resources Specialist)	GS-201-13	Supervision and Indirect Support	1.0	Albuquerque, NM
Human Resources Specialist	GS-201-12	PWS 2.1.1-2.1.2, 2.1.5, 2.1.7, 3.1.3, 3.2.17, 3.2.20, 3.4.1-3.4.2, 3.5.1-3.5.3	1.0	Albuquerque, NM
Human Resources Specialist (TQP)	GS-201-12	PWS 3.5.1, 3.6.1-3.6.2	1.0	Albuquerque, NM
Human Resources Specialist	GS-201-11	PWS 3.1.1, 3.2.11, 3.2.16-3.2.17, 3.2.19-3.2.20	2.0	Albuquerque, NM
Human Resources Specialist (Team Lead)	GS-201-09/11	PWS 3.3.9-3.3.10, 3.3.17, Supervision	1.0	Albuquerque, NM
Human Resources Specialist	GS-201-09/11	PWS 3.2.1-3.2.14, 3.3.9, 3.3.17-3.3.18	3.0	Albuquerque, NM
Human Resources Assistant	GS-203-07	PWS 3.3.1-3.3.6, 3.3.8, 3.3.10-3.3.14, 3.3.18, 3.6.3	12.0	Albuquerque, NM
General Clerk (Human Resources Assistant)	GS-203-05	PWS 3.3.15 and Indirect Support	1.0	Albuquerque, NM
Chicago Liaison Site				
Human Resources Specialist (Liaison)	GS-201-12	PWS 2.1.1, 2.1.7, 3.1.1, 3.2.1, 3.4.1-3.4.2, 3.5.1-3.5.3	1.0	Chicago, IL
Idaho Liaison Site				
Human Resources Specialist (Liaison)	GS-201-12	PWS 2.1.1, 2.1.7, 3.1.1, 3.2.1, 3.4.1-3.4.2, 3.5.1-3.5.3	1.0	Idaho Falls, ID
Oak Ridge Liaison Site				
Human Resources Specialist (Liaison)	GS-201-12	PWS 2.1.1, 2.1.7, 3.1.1, 3.2.1, 3.4.1-3.4.2, 3.5.1-3.5.3	1.0	Oak Ridge, TN
Richland Liaison Site				
Human Resources Specialist (Liaison)	GS-201-12	PWS 2.1.1, 2.1.7, 3.1.1, 3.2.1, 3.4.1-3.4.2, 3.5.1-3.5.3	1.0	Richland, WA
Savannah River Liaison Site				
Human Resources Specialist (Liaison)	GS-201-12	PWS 2.1.1, 2.1.7, 3.1.1, 3.2.1, 3.4.1-3.4.2, 3.5.1-3.5.3	1.0	Aiken, SC
TOTAL			59.00	

DOE – Training Support Services

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APPENDIX F-2
MATRICES FOR THE LABOR CATEGORIES
BY PWS FUNCTIONAL AREA -- 3.1 NEEDS ASSESSMENT

LABOR CATEGORY	GRADE-SERIES	SKILLS TO BE EMPLOYED	NUMBER OF FULL-TIME PERSONNEL FOR THE EFFORT	LOCATION OF EFFORT
DOE Headquarters Core Group				
Project Manager (Supervisory Human Resources Specialist)	GS-201-14			Washington, DC
Quality Control Management Point of Contact (Human Resources Specialist)	GS-201-13			Washington, DC
Corporate Training Officer (Human Resources Specialist)	GS-201-13			Washington, DC
Corporate Training Specialist (Human Resources Specialist)	GS-201-12	PWS 3.1.1-3.1.3	0.983	Washington, DC
Technical Qualifications Program Manager (Human Resources Specialist)	GS-201-13			Washington, DC
Administrative Assistant (Human Resources Assistant)	GS-203-07			Washington, DC
Washington Operations Center (WOC)				
Deputy Project Manager (Supervisory Human Resources Specialist)	GS-201-13			Washington, DC
Human Resources Specialist	GS-201-12	PWS 3.1.3	0.068	Washington, DC
Human Resources Specialist (TQP)	GS-201-12			Washington, DC
Human Resources Specialist	GS-201-11	PWS 3.1.1	1.310	Washington, DC
Human Resources Specialist (Team Lead)	GS-201-09/11			Washington, DC
Human Resources Specialist	GS-201-09/11			Washington, DC
Human Resources Assistant	GS-203-07			Washington, DC
General Clerk (Human Resources Assistant)	GS-203-05			Washington, DC
Albuquerque Operations Center (AOC)				
Deputy Project Manager (Supervisory Human Resources Specialist)	GS-201-13			Albuquerque, NM
Human Resources Specialist	GS-201-12	PWS 3.1.3	0.060	Albuquerque, NM
Human Resources Specialist (TQP)	GS-201-12			Albuquerque, NM
Human Resources Specialist	GS-201-11	PWS 3.1.1	0.498	Albuquerque, NM
Human Resources Specialist (Team Lead)	GS-201-09/11			Albuquerque, NM
Human Resources Specialist	GS-201-09/11			Albuquerque, NM
Human Resources Assistant	GS-203-07			Albuquerque, NM
General Clerk (Human Resources Assistant)	GS-203-05			Albuquerque, NM
Chicago Liaison Site				
Human Resources Specialist (Liaison)	GS-201-12	PWS 3.1.1	0.120	Chicago, IL
Idaho Liaison Site				
Human Resources Specialist (Liaison)	GS-201-12	PWS 3.1.1	0.108	Idaho Falls, ID
Oak Ridge Liaison Site				
Human Resources Specialist (Liaison)	GS-201-12	PWS 3.1.1	0.134	Oak Ridge, TN
Richland Liaison Site				
Human Resources Specialist (Liaison)	GS-201-12	PWS 3.1.1	0.136	Richland, WA
Savannah River Liaison Site				
Human Resources Specialist (Liaison)	GS-201-12	PWS 3.1.1	0.130	Aiken, SC
TOTALS			3.547	

DOE – Training Support Services

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APPENDIX F-3
MATRICES FOR THE LABOR CATEGORIES
BY PWS FUNCTIONAL AREA -- 3.2 EVALUATION

LABOR CATEGORY	GRADE-SERIES	SKILLS TO BE EMPLOYED	NUMBER OF FULL-TIME PERSONNEL FOR THE EFFORT	LOCATION OF EFFORT
DOE Headquarters Core Group				
Project Manager (Supervisory Human Resources Specialist)	GS-201-14			Washington, DC
Quality Control Management Point of Contact (Human Resources Specialist)	GS-201-13	PWS 3.2.17	0.062	Washington, DC
Corporate Training Officer (Human Resources Specialist)	GS-201-13			Washington, DC
Corporate Training Specialist (Human Resources Specialist)	GS-201-12			Washington, DC
Technical Qualifications Program Manager (Human Resources Specialist)	GS-201-13			Washington, DC
Administrative Assistant (Human Resources Assistant)	GS-203-07			Washington, DC
Washington Operations Center (WOC)				
Deputy Project Manager (Supervisory Human Resources Specialist)	GS-201-13			Washington, DC
Human Resources Specialist	GS-201-12	PWS 3.2.17, 3.2.20	0.201	Washington, DC
Human Resources Specialist (TQP)	GS-201-12			Washington, DC
Human Resources Specialist	GS-201-11	PWS 3.2.11, 3.2.16 3.2.17, 3.2.19- 3.2.20	1.690	Washington, DC
Human Resources Specialist (Team Lead)	GS-201-09/11			Washington, DC
Human Resources Specialist	GS-201-09/11	PWS 3.2.1-3.2.14	3.815	Washington, DC
Human Resources Assistant	GS-203-07			Washington, DC
General Clerk (Human Resources Assistant)	GS-203-05			Washington, DC
Albuquerque Operations Center (AOC)				
Deputy Project Manager (Supervisory Human Resources Specialist)	GS-201-13			Albuquerque, NM
Human Resources Specialist	GS-201-12	PWS 3.2.17, 3.2.20	0.125	Albuquerque, NM
Human Resources Specialist (TQP)	GS-201-12			Albuquerque, NM
Human Resources Specialist	GS-201-11	PWS 3.2.11, 3.2.16 3.2.17, 3.2.19- 3.2.20	1.502	Albuquerque, NM
Human Resources Specialist (Team Lead)	GS-201-09/11			Albuquerque, NM
Human Resources Specialist	GS-201-09/11	PWS 3.2.1-3.2.14	2.894	Albuquerque, NM
Human Resources Assistant	GS-203-07			Albuquerque, NM
General Clerk (Human Resources Assistant)	GS-203-05			Albuquerque, NM
Chicago Liaison Site				
Human Resources Specialist (Liaison)	GS-201-12	PWS 3.2.1	0.033	Chicago, IL
Idaho Liaison Site				
Human Resources Specialist (Liaison)	GS-201-12	PWS 3.2.1	0.033	Idaho Falls, ID
Oak Ridge Liaison Site				
Human Resources Specialist (Liaison)	GS-201-12	PWS 3.2.1	0.032	Oak Ridge, TN
Richland Liaison Site				
Human Resources Specialist (Liaison)	GS-201-12	PWS 3.2.1	0.032	Richland, WA
Savannah River Liaison Site				
Human Resources Specialist (Liaison)	GS-201-12	PWS 3.2.1	0.032	Aiken, SC
TOTALS			10.451	

DOE – Training Support Services

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APPENDIX F-4
MATRICES FOR THE LABOR CATEGORIES
BY PWS FUNCTIONAL AREA -- 3.3 CUSTOMER SERVICE

LABOR CATEGORY	GRADE-SERIES	SKILLS TO BE EMPLOYED	NUMBER OF FULL-TIME PERSONNEL FOR THE EFFORT	LOCATION OF EFFORT
DOE Headquarters Core Group				
Project Manager (Supervisory Human Resources Specialist)	GS-201-14			Washington, DC
Quality Control Management Point of Contact (Human Resources Specialist)	GS-201-13			Washington, DC
Corporate Training Officer (Human Resources Specialist)	GS-201-13			Washington, DC
Corporate Training Specialist (Human Resources Specialist)	GS-201-12	PWS 3.3.17-3.3.19	0.148	Washington, DC
Technical Qualifications Program Manager (Human Resources Specialist)	GS-201-13			Washington, DC
Administrative Assistant (Human Resources Assistant)	GS-203-07			Washington, DC
Washington Operations Center (WOC)				
Deputy Project Manager (Supervisory Human Resources Specialist)	GS-201-13			Washington, DC
Human Resources Specialist	GS-201-12			Washington, DC
Human Resources Specialist (TQP)	GS-201-12			Washington, DC
Human Resources Specialist	GS-201-11			Washington, DC
Human Resources Specialist (Team Lead)	GS-201-09/11	PWS 3.3.9-3.3.10, 3.3.17	0.135	Washington, DC
Human Resources Specialist	GS-201-09/11	PWS 3.3.9, 3.3.17-3.3.18	0.185	Washington, DC
Human Resources Assistant	GS-203-07	PWS 3.3.1-3.3.6, 3.3.8, 3.3.10-3.3.14, 3.3.18	8.708	Washington, DC
General Clerk (Human Resources Assistant)	GS-203-05	PWS 3.3.15	0.696	Washington, DC
Albuquerque Operations Center (AOC)				
Deputy Project Manager (Supervisory Human Resources Specialist)	GS-201-13			Albuquerque, NM
Human Resources Specialist	GS-201-12			Albuquerque, NM
Human Resources Specialist (TQP)	GS-201-12			Albuquerque, NM
Human Resources Specialist	GS-201-11			Albuquerque, NM
Human Resources Specialist (Team Lead)	GS-201-09/11	PWS 3.3.9-3.3.10, 3.3.17	0.098	Albuquerque, NM
Human Resources Specialist	GS-201-09/11	PWS 3.3.9, 3.3.17-3.3.18	0.106	Albuquerque, NM
Human Resources Assistant	GS-203-07	PWS 3.3.1-3.3.6, 3.3.8, 3.3.10-3.3.14, 3.3.18	9.490	Albuquerque, NM
General Clerk (Human Resources Assistant)	GS-203-05	PWS 3.3.15	0.696	Albuquerque, NM
Chicago Liaison Site				
Human Resources Specialist (Liaison)	GS-201-12			Chicago, IL
Idaho Liaison Site				
Human Resources Specialist (Liaison)	GS-201-12			Idaho Falls, ID
Oak Ridge Liaison Site				
Human Resources Specialist (Liaison)	GS-201-12			Oak Ridge, TN
Richland Liaison Site				
Human Resources Specialist (Liaison)	GS-201-12			Richland, WA
Savannah River Liaison Site				
Human Resources Specialist (Liaison)	GS-201-12			Aiken, SC
TOTALS			20.262	

DOE – Training Support Services

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APPENDIX F-5
MATRICES FOR THE LABOR CATEGORIES
BY PWS FUNCTIONAL AREA -- 3.4 SUBJECT MATTER EXPERTISE

LABOR CATEGORY	GRADE-SERIES	SKILLS TO BE EMPLOYED	NUMBER OF FULL-TIME PERSONNEL FOR THE EFFORT	LOCATION OF EFFORT
DOE Headquarters Core Group				
Project Manager (Supervisory Human Resources Specialist)	GS-201-14			Washington, DC
Quality Control Management Point of Contact (Human Resources Specialist)	GS-201-13			Washington, DC
Corporate Training Officer (Human Resources Specialist)	GS-201-13	PWS 3.4.1-3.4.3	0.235	Washington, DC
Corporate Training Specialist (Human Resources Specialist)	GS-201-12	PWS 3.4.1-3.4.2	0.280	Washington, DC
Technical Qualifications Program Manager (Human Resources Specialist)	GS-201-13			Washington, DC
Administrative Assistant (Human Resources Assistant)	GS-203-07			Washington, DC
Washington Operations Center (WOC)				
Deputy Project Manager (Supervisory Human Resources Specialist)	GS-201-13			Washington, DC
Human Resources Specialist	GS-201-12	PWS 3.4.1-3.4.2	0.333	Washington, DC
Human Resources Specialist (TQP)	GS-201-12			Washington, DC
Human Resources Specialist	GS-201-11			Washington, DC
Human Resources Specialist (Team Lead)	GS-201-09/11			Washington, DC
Human Resources Specialist	GS-201-09/11			Washington, DC
Human Resources Assistant	GS-203-07			Washington, DC
General Clerk (Human Resources Assistant)	GS-203-05			Washington, DC
Albuquerque Operations Center (AOC)				
Deputy Project Manager (Supervisory Human Resources Specialist)	GS-201-13			Albuquerque, NM
Human Resources Specialist	GS-201-12	PWS 3.4.1-3.4.2	0.292	Albuquerque, NM
Human Resources Specialist (TQP)	GS-201-12			Albuquerque, NM
Human Resources Specialist	GS-201-11			Albuquerque, NM
Human Resources Specialist (Team Lead)	GS-201-09/11			Albuquerque, NM
Human Resources Specialist	GS-201-09/11			Albuquerque, NM
Human Resources Assistant	GS-203-07			Albuquerque, NM
General Clerk (Human Resources Assistant)	GS-203-05			Albuquerque, NM
Chicago Liaison Site				
Human Resources Specialist (Liaison)	GS-201-12	PWS 3.4.1-3.4.2	0.468	Chicago, IL
Idaho Liaison Site				
Human Resources Specialist (Liaison)	GS-201-12	PWS 3.4.1-3.4.2	0.474	Idaho Falls, ID
Oak Ridge Liaison Site				
Human Resources Specialist (Liaison)	GS-201-12	PWS 3.4.1-3.4.2	0.460	Oak Ridge, TN
Richland Liaison Site				
Human Resources Specialist (Liaison)	GS-201-12	PWS 3.4.1-3.4.2	0.460	Richland, WA
Savannah River Liaison Site				
Human Resources Specialist (Liaison)	GS-201-12	PWS 3.4.1-3.4.2	0.462	Aiken, SC
TOTALS			3.464	

APPENDIX F-6
MATRICES FOR THE LABOR CATEGORIES
BY PWS FUNCTIONAL AREA -- 3.5 EMPLOYEE DEVELOPMENT

LABOR CATEGORY	GRADE-SERIES	SKILLS TO BE EMPLOYED	NUMBER OF FULL-TIME PERSONNEL FOR THE EFFORT	LOCATION OF EFFORT
DOE Headquarters Core Group				
Project Manager (Supervisory Human Resources Specialist)	GS-201-14			Washington, DC
Quality Control Management Point of Contact (Human Resources Specialist)	GS-201-13			Washington, DC
Corporate Training Officer (Human Resources Specialist)	GS-201-13	PWS 3.5.1-3.5.3	0.356	Washington, DC
Corporate Training Specialist (Human Resources Specialist)	GS-201-12	PWS 3.5.1-3.5.3	0.727	Washington, DC
Technical Qualifications Program Manager (Human Resources Specialist)	GS-201-13	PWS 3.5.1-3.5.3	0.338	Washington, DC
Administrative Assistant (Human Resources Assistant)	GS-203-07			Washington, DC
Washington Operations Center (WOC)				
Deputy Project Manager (Supervisory Human Resources Specialist)	GS-201-13			Washington, DC
Human Resources Specialist	GS-201-12	PWS 3.5.1-3.5.3	0.866	Washington, DC
Human Resources Specialist (TQP)	GS-201-12	PWS 3.5.1	0.353	Washington, DC
Human Resources Specialist	GS-201-11			Washington, DC
Human Resources Specialist (Team Lead)	GS-201-09/11			Washington, DC
Human Resources Specialist	GS-201-09/11			Washington, DC
Human Resources Assistant	GS-203-07			Washington, DC
General Clerk (Human Resources Assistant)	GS-203-05			Washington, DC
Albuquerque Operations Center (AOC)				
Deputy Project Manager (Supervisory Human Resources Specialist)	GS-201-13			Albuquerque, NM
Human Resources Specialist	GS-201-12	PWS 3.5.1-3.5.3	0.106	Albuquerque, NM
Human Resources Specialist (TQP)	GS-201-12	PWS 3.5.1	0.426	Albuquerque, NM
Human Resources Specialist	GS-201-11			Albuquerque, NM
Human Resources Specialist (Team Lead)	GS-201-09/11			Albuquerque, NM
Human Resources Specialist	GS-201-09/11			Albuquerque, NM
Human Resources Assistant	GS-203-07			Albuquerque, NM
General Clerk (Human Resources Assistant)	GS-203-05			Albuquerque, NM
Chicago Liaison Site				
Human Resources Specialist (Liaison)	GS-201-12	PWS 3.5.1-3.5.3	0.312	Chicago, IL
Idaho Liaison Site				
Human Resources Specialist (Liaison)	GS-201-12	PWS 3.5.1-3.5.3	0.316	Idaho Falls, ID
Oak Ridge Liaison Site				
Human Resources Specialist (Liaison)	GS-201-12	PWS 3.5.1-3.5.3	0.307	Oak Ridge, TN
Richland Liaison Site				
Human Resources Specialist (Liaison)	GS-201-12	PWS 3.5.1-3.5.3	0.306	Richland, WA
Savannah River Liaison Site				
Human Resources Specialist (Liaison)	GS-201-12	PWS 3.5.1-3.5.3	0.308	Aiken, SC
TOTALS			4.721	

APPENDIX F-7
MATRICES FOR THE LABOR CATEGORIES
BY PWS FUNCTIONAL AREA -- 3.6 TECHNICAL QUALIFICATION PROGRAM
SUPPORT

LABOR CATEGORY	GRADE-SERIES	SKILLS TO BE EMPLOYED	NUMBER OF FULL-TIME PERSONNEL FOR THE EFFORT	LOCATION OF EFFORT
DOE Headquarters Core Group				
Project Manager (Supervisory Human Resources Specialist)	GS-201-14			Washington, DC
Quality Control Management Point of Contact (Human Resources Specialist)	GS-201-13			Washington, DC
Corporate Training Officer (Human Resources Specialist)	GS-201-13			Washington, DC
Corporate Training Specialist (Human Resources Specialist)	GS-201-12			Washington, DC
Technical Qualifications Program Manager (Human Resources Specialist)	GS-201-13	PWS 3.6.1-3.6.2	0.552	Washington, DC
Administrative Assistant (Human Resources Assistant)	GS-203-07			Washington, DC
Washington Operations Center (WOC)				
Deputy Project Manager (Supervisory Human Resources Specialist)	GS-201-13			Washington, DC
Human Resources Specialist	GS-201-12			Washington, DC
Human Resources Specialist (TQP)	GS-201-12	PWS 3.6.1-3.6.2	0.647	Washington, DC
Human Resources Specialist	GS-201-11			Washington, DC
Human Resources Specialist (Team Lead)	GS-201-09/11			Washington, DC
Human Resources Specialist	GS-201-09/11			Washington, DC
Human Resources Assistant	GS-203-07	PWS 3.6.3	1.292	Washington, DC
General Clerk (Human Resources Assistant)	GS-203-05			Washington, DC
Albuquerque Operations Center (AOC)				
Deputy Project Manager (Supervisory Human Resources Specialist)	GS-201-13			Albuquerque, NM
Human Resources Specialist	GS-201-12			Albuquerque, NM
Human Resources Specialist (TQP)	GS-201-12	PWS 3.6.1-3.6.2	0.574	Albuquerque, NM
Human Resources Specialist	GS-201-11			Albuquerque, NM
Human Resources Specialist (Team Lead)	GS-201-09/11			Albuquerque, NM
Human Resources Specialist	GS-201-09/11			Albuquerque, NM
Human Resources Assistant	GS-203-07	PWS 3.6.3	2.510	Albuquerque, NM
General Clerk (Human Resources Assistant)	GS-203-05			Albuquerque, NM
Chicago Liaison Site				
Human Resources Specialist (Liaison)	GS-201-12			Chicago, IL
Idaho Liaison Site				
Human Resources Specialist (Liaison)	GS-201-12			Idaho Falls, ID
Oak Ridge Liaison Site				
Human Resources Specialist (Liaison)	GS-201-12			Oak Ridge, TN
Richland Liaison Site				
Human Resources Specialist (Liaison)	GS-201-12			Richland, WA
Savannah River Liaison Site				
Human Resources Specialist (Liaison)	GS-201-12			Aiken, SC
TOTALS			5.575	

DOE – Training Support Services

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APPENDIX F-8
MATRICES FOR THE LABOR CATEGORIES
BY PWS FUNCTIONAL AREA -- 2.1 GENERAL REQUIREMENTS

LABOR CATEGORY	GRADE-SERIES	SKILLS TO BE EMPLOYED	NUMBER OF FULL-TIME PERSONNEL FOR THE EFFORT	LOCATION OF EFFORT
DOE Headquarters Core Group				
Project Manager (Supervisory Human Resources Specialist)	GS-201-14			Washington, DC
Quality Control Management Point of Contact (Human Resources Specialist)	GS-201-13	PWS 2.1.2	0.116	Washington, DC
Corporate Training Officer (Human Resources Specialist)	GS-201-13	PWS 2.1.2-2.1.4, 2.1.6	0.353	Washington, DC
Corporate Training Specialist (Human Resources Specialist)	GS-201-12	PWS 2.1.2, 2.1.4-2.1.6	0.652	Washington, DC
Technical Qualifications Program Manager (Human Resources Specialist)	GS-201-13			Washington, DC
Administrative Assistant (Human Resources Assistant)	GS-203-07			Washington, DC
Washington Operations Center (WOC)				
Deputy Project Manager (Supervisory Human Resources Specialist)	GS-201-13			Washington, DC
Human Resources Specialist	GS-201-12	PWS 2.1.1-2.1.2, 2.1.5, 2.1.7	1.532	Washington, DC
Human Resources Specialist (TQP)	GS-201-12			Washington, DC
Human Resources Specialist	GS-201-11			Washington, DC
Human Resources Specialist (Team Lead)	GS-201-09/11			Washington, DC
Human Resources Specialist	GS-201-09/11			Washington, DC
Human Resources Assistant	GS-203-07			Washington, DC
General Clerk (Human Resources Assistant)	GS-203-05			Washington, DC
Albuquerque Operations Center (AOC)				
Deputy Project Manager (Supervisory Human Resources Specialist)	GS-201-13			Albuquerque, NM
Human Resources Specialist	GS-201-12	PWS 2.1.1-2.1.2, 2.1.5, 2.1.7	0.417	Albuquerque, NM
Human Resources Specialist (TQP)	GS-201-12			Albuquerque, NM
Human Resources Specialist	GS-201-11			Albuquerque, NM
Human Resources Specialist (Team Lead)	GS-201-09/11			Albuquerque, NM
Human Resources Specialist	GS-201-09/11			Albuquerque, NM
Human Resources Assistant	GS-203-07			Albuquerque, NM
General Clerk (Human Resources Assistant)	GS-203-05			Albuquerque, NM
Chicago Liaison Site				
Human Resources Specialist (Liaison)	GS-201-12	PWS 2.1.1, 2.1.7	0.067	Chicago, IL
Idaho Liaison Site				
Human Resources Specialist (Liaison)	GS-201-12	PWS 2.1.1, 2.1.7	0.068	Idaho Falls, ID
Oak Ridge Liaison Site				
Human Resources Specialist (Liaison)	GS-201-12	PWS 2.1.1, 2.1.7	0.066	Oak Ridge, TN
Richland Liaison Site				
Human Resources Specialist (Liaison)	GS-201-12	PWS 2.1.1, 2.1.7	0.066	Richland, WA
Savannah River Liaison Site				
Human Resources Specialist (Liaison)	GS-201-12	PWS 2.1.1, 2.1.7	0.067	Aiken, SC
TOTALS			3.404	

APPENDIX F-9
MATRICES FOR THE LABOR CATEGORIES
BY PWS FUNCTIONAL AREA -- 5.0 GENERAL REQUIREMENTS

LABOR CATEGORY	GRADE-SERIES	SKILLS TO BE EMPLOYED	NUMBER OF FULL-TIME PERSONNEL FOR THE EFFORT	LOCATION OF EFFORT
DOE Headquarters Core Group				
Project Manager (Supervisory Human Resources Specialist)	GS-201-14	PWS 5.5.1-5.5.3	0.051	Washington, DC
Quality Control Management Point of Contact (Human Resources Specialist)	GS-201-13	PWS 5.1.1, 5.1.3-5.1.4, 5.2.2	0.563	Washington, DC
Corporate Training Officer (Human Resources Specialist)	GS-201-13	PWS 5.5.1-5.5.3	0.051	Washington, DC
Corporate Training Specialist (Human Resources Specialist)	GS-201-12	PWS 5.5.1-5.5.3	0.057	Washington, DC
Technical Qualifications Program Manager (Human Resources Specialist)	GS-201-13			Washington, DC
Administrative Assistant (Human Resources Assistant)	GS-203-07	PWS 5.10	0.068	Washington, DC
Washington Operations Center (WOC)				
Deputy Project Manager (Supervisory Human Resources Specialist)	GS-201-13	PWS 5.5.1	0.027	Washington, DC
Human Resources Specialist	GS-201-12			Washington, DC
Human Resources Specialist (TQP)	GS-201-12			Washington, DC
Human Resources Specialist	GS-201-11			Washington, DC
Human Resources Specialist (Team Lead)	GS-201-09/11			Washington, DC
Human Resources Specialist	GS-201-09/11			Washington, DC
Human Resources Assistant	GS-203-07			Washington, DC
General Clerk (Human Resources Assistant)	GS-203-05			Washington, DC
Albuquerque Operations Center (AOC)				
Deputy Project Manager (Supervisory Human Resources Specialist)	GS-201-13	PWS 5.5.1	0.027	Albuquerque, NM
Human Resources Specialist	GS-201-12			Albuquerque, NM
Human Resources Specialist (TQP)	GS-201-12			Albuquerque, NM
Human Resources Specialist	GS-201-11			Albuquerque, NM
Human Resources Specialist (Team Lead)	GS-201-09/11			Albuquerque, NM
Human Resources Specialist	GS-201-09/11			Albuquerque, NM
Human Resources Assistant	GS-203-07			Albuquerque, NM
General Clerk (Human Resources Assistant)	GS-203-05			Albuquerque, NM
Chicago Liaison Site				
Human Resources Specialist (Liaison)	GS-201-12			Chicago, IL
Idaho Liaison Site				
Human Resources Specialist (Liaison)	GS-201-12			Idaho Falls, ID
Oak Ridge Liaison Site				
Human Resources Specialist (Liaison)	GS-201-12			Oak Ridge, TN
Richland Liaison Site				
Human Resources Specialist (Liaison)	GS-201-12			Richland, WA
Savannah River Liaison Site				
Human Resources Specialist (Liaison)	GS-201-12			Aiken, SC
TOTALS			0.844	

APPENDIX F-10
MATRICES FOR THE LABOR CATEGORIES
SUPERVISION AND INDIRECT PWS ACTIVITIES REQUIREMENTS

LABOR CATEGORY	GRADE-SERIES	SKILLS TO BE EMPLOYED	NUMBER OF FULL-TIME PERSONNEL FOR THE EFFORT	LOCATION OF EFFORT
DOE Headquarters Core Group				
Project Manager (Supervisory Human Resources Specialist)	GS-201-14	PWS 4.1.2	0.949	Washington, DC
Quality Control Management Point of Contact (Human Resources Specialist)	GS-201-13	PWS 4.1.3	0.259	Washington, DC
Corporate Training Officer (Human Resources Specialist)	GS-201-13	PWS 4.1.4.1	0.006	Washington, DC
Corporate Training Specialist (Human Resources Specialist)	GS-201-12	PWS 4.1.4.2	0.152	Washington, DC
Technical Qualifications Program Manager (Human Resources Specialist)	GS-201-13	PWS 4.1.4.3	0.110	Washington, DC
Administrative Assistant (Human Resources Assistant)	GS-203-07	Indirect Support	0.932	Washington, DC
Washington Operations Center (WOC)				
Deputy Project Manager (Supervisory Human Resources Specialist)	GS-201-13	Supervision and Indirect Support	0.973	Washington, DC
Human Resources Specialist	GS-201-12			Washington, DC
Human Resources Specialist (TQP)	GS-201-12			Washington, DC
Human Resources Specialist	GS-201-11			Washington, DC
Human Resources Specialist (Team Lead)	GS-201-09/11	Supervision and Indirect Support	0.865	Washington, DC
Human Resources Specialist	GS-201-09/11			Washington, DC
Human Resources Assistant	GS-203-07			Washington, DC
General Clerk (Human Resources Assistant)	GS-203-05	Indirect Support	0.304	Washington, DC
Albuquerque Operations Center (AOC)				
Deputy Project Manager (Supervisory Human Resources Specialist)	GS-201-13	Supervision and Indirect Support	0.973	Albuquerque, NM
Human Resources Specialist	GS-201-12			Albuquerque, NM
Human Resources Specialist (TQP)	GS-201-12			Albuquerque, NM
Human Resources Specialist	GS-201-11			Albuquerque, NM
Human Resources Specialist (Team Lead)	GS-201-09/11	Supervision and Indirect Support	0.902	Albuquerque, NM
Human Resources Specialist	GS-201-09/11			Albuquerque, NM
Human Resources Assistant	GS-203-07			Albuquerque, NM
General Clerk (Human Resources Assistant)	GS-203-05	Indirect Support	0.304	Albuquerque, NM
Chicago Liaison Site				
Human Resources Specialist (Liaison)	GS-201-12			Chicago, IL
Idaho Liaison Site				
Human Resources Specialist (Liaison)	GS-201-12			Idaho Falls, ID
Oak Ridge Liaison Site				
Human Resources Specialist (Liaison)	GS-201-12			Oak Ridge, TN
Richland Liaison Site				
Human Resources Specialist (Liaison)	GS-201-12			Richland, WA
Savannah River Liaison Site				
Human Resources Specialist (Liaison)	GS-201-12			Aiken, SC
TOTALS			6.729	

APPENDIX F-11
MATRICES FOR THE LABOR CATEGORIES
ABANDONED LOCATION SUPPORT

Note: 'x' denotes the MEO location providing service and support

Abandoned Location	DOE Elements (from PWS Appendix A)		Core Group Washington, DC	WOC Washington, DC	AOC Albuquerque, NM	Chicago Liaison Site Chicago, IL	Idaho Liaison Site Idaho Falls, ID	Oak Ridge Liaison Site Oak Ridge, TN	Richland Liaison Site Richland, WA	Savannah River Liaison Site Aiken, SC
Golden, CO	Golden Field Office		x		x					
Germantown, MD	Office of Security	SO	x	x						
Las Vegas, NV	NNSA NV	NV	x		x					
Oakland, CA	NNSA Oakland	LL	x		x					
Pittsburgh, PA	National Energy Technology Laboratory, Pittsburgh, PA.	NETL	x	x						
New Orleans, LA	Strategic Petroleum Reserve Project Office, New Orleans, LA	SPRO	x	x						
Upton, NY	Brookhaven Area Office		x	x		x				
Miamisburg, OH	Ohio	OHIO	x	x						
Golden, CO	Rocky Flats	RF	x		x					

DOE – Training Support Services

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APPENDIX G

WORKLOAD DRIVERS

FUNCTIONAL AREA	WORKLOAD DRIVERS
3.1 Needs Assessment	<ul style="list-style-type: none"> • Number of DOE Elements supported • Number of employees at each element • Number of IDP completed • Number of new needs assessments
3.2 Evaluation	<ul style="list-style-type: none"> • Number of course offerings • Estimated number of new courses to be procured • Number of employee and supervisor feedback surveys or evaluations received • Number of cost-benefit analyses performed
3.3 Customer Service	<ul style="list-style-type: none"> • Number of training instances requiring support • Number of courses • Number of phone calls, e-mails, and personal inquiries • Number of communications • Number of reports
3.4 Subject Matter Expertise	<ul style="list-style-type: none"> • Number of hours required to provide SME
3.5 Employee Development	<ul style="list-style-type: none"> • Hours required per program • Number of programs • Financial resources available to the specific program • DOE-wide emphasis on a particular program
3.6 Technical Qualification Program Support	<ul style="list-style-type: none"> • Number of DOE personnel involved in the TQP • Number of locations with TQP activity
2.1 General Requirements	<ul style="list-style-type: none"> • Number of DOE Elements • Number of recommendations • Number of reporting requirements

APPENDIX H

COURSE EVALUATION CHECKLIST

COURSE: _____ LOCATION: _____

DATE OF EVALUATION: _____

EVALUATION PERFORMED BY: _____

Review curriculum outline (3.2.9, 3.2.2, 3.2.4)

Does it outline, by training setting, the learning objectives in the prescribed sequence?

Y N Comments: _____

Is the training based on needs assessment data?

Y	N	Comments:

Does the training reflect job performance requirements (i.e., knowledge, skills, and abilities)?

Y	N	Comments:

Review course lesson plans (3.2.11)

Are learning objectives identified?

Y	N	Comments:

Is course content identified?

Y	N	Comments:
---	---	-----------

Are learning activities identified?

Y	N	Comments:

Is training equipment identified?

Y	N	Comments:

Review course learning objectives, methods, and materials (3.2.3, 3.2.10, 3.2.12)

Are learning objectives observable?

Y	N	Comments:

Are learning objectives measurable?

Y	N	Comments:

Do learning objectives consider the appropriate training method and setting? (e.g., self-paced instruction, OJT, simulator, computer-based, classroom)

Y	N	Comments:

Are selected methods based on and appropriate for the objectives and settings?

Y	N	Comments:

Do printed training materials support the learning objectives and emphasize job-related information?

Y	N	Comments:

Review course tests (3.2.5-3.2.7)

Are test items consistent with the learning objectives?

Y N

Comments: _____

Do the test item formats relate to the learning objectives?

Y N

Comments: _____

Are test item formats appropriate (e.g., performance or knowledge)?

Y N

Comments: _____

Is the number of test items for each learning objective appropriate?

Y N

Comments: _____

Is the meaning and correct answer for each test item sound and incontestable?

Y N

Comments: _____

Are items in test bank for future use? (If not, they should be incorporated.)

Y N

Comments: _____

Are test scoring methods equitable and appropriate?

Y N

Comments: _____

Are test administration guidelines included and appropriate?

Y N

Comments: _____

Ensure evaluations collected (3.2.14)

Is test performance data provided?

Y N

Comments: _____

Are instructor critiques completed?

Y N

Comments: _____

Are trainee critiques completed?

Y N

Comments: _____

Did any trainee question course content, materials, or methods as personally objectionable?

Y N

Comments: _____

Review course schedule and loading (3.2.8)

Was the instructor qualified and available?

Y N

Comments: _____

Was the scheduled facility available?

Y N

Comments: _____

Was the facility suitable for the course for the class size, content, and special needs?

Y N

Comments: _____

Was equipment available?

Y N

Comments: _____

APPENDIX I-1
PHASE-IN HOURS AND ACTIVITIES
STAFF ON BOARD BY WEEK OF PHASE-IN PERIOD

Position	Location	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6	Week 7	Week 8	Week 9	Week 10	Week 11	Week 12	Week 13	Week 14	Week 15	Week 16	TOTAL HOURS
Project Manager (GS-14)	Core	12	12	12	12	16	16	16	18	18	30	34	40	40	40	40	40	396
Quality Control Manager POC (GS-13)	Core	0	0	0	0	0	0	0	0	0	0	0	0	0	0	20	30	90
Corporate Training Officer (GS-13)	Core	2	2	2	2	2	2	6	8	8	12	12	16	16	16	16	16	138
Corporate Training Specialist (GS-12)	Core	0	0	0	0	0	0	0	0	0	8	12	12	12	12	24	24	104
TQP Manager (GS-13)	Core	0	0	0	4	4	4	8	8	8	12	12	12	20	24	24	26	166
Administrative Assistant (GS-07)	Core	2	2	4	4	4	4	4	4	4	4	4	4	20	26	30	30	150
Deputy Project Manager (GS-13)	WOC	0	0	0	0	0	0	6	8	8	12	18	20	26	40	40	40	218
Deputy Project Manager (GS-13)	AOC	0	0	0	0	0	0	6	8	8	12	18	20	26	40	40	40	218
Human Resources Specialists (GS-12)	WOC	0	0	0	0	0	0	0	0	0	6	12	12	24	24	24	24	126
Human Resources Specialists (GS-12)	AOC	0	0	0	0	0	0	0	0	0	6	12	12	24	24	24	24	126
Human Resources Specialist (TQP)																		
Human Resources Specialist (TQP)	WOC	0	0	0	0	0	0	0	0	0	0	0	0	0	8	8	8	24
Human Resources Specialist (TQP)																		
Human Resources Specialists (GS-11)	AOC	0	0	0	0	0	0	0	0	0	0	0	0	0	8	8	8	24
Human Resources Specialists (GS-11)	WOC	0	0	0	0	0	0	0	0	0	8	8	8	16	16	16	24	96
Human Resources Specialists (GS-11)	AOC	0	0	0	0	0	0	0	0	0	8	8	8	16	16	16	24	96
Team Lead (GS-09/11)	WOC	0	0	0	0	0	0	0	0	0	8	12	16	16	20	24	40	148
Team Lead (GS-09/11)	AOC	0	0	0	0	0	0	0	0	0	8	12	16	16	20	24	40	148
Human Resources Specialists (GS-09/11)	WOC	0	0	0	0	0	0	0	0	0	4	6	6	12	12	12	20	72
Human Resources Specialists (GS-09/11)	AOC	0	0	0	0	0	0	0	0	0	4	6	6	12	12	12	20	72
Human Resources Assistants (GS-07)	WOC	0	0	0	0	0	0	0	0	18	22	32	42	44	54	60	64	336
Human Resources Assistants (GS-07)	AOC	0	0	0	0	0	0	0	0	18	22	32	42	44	54	60	64	336
General Clerk (GS-05)	WOC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	8	8
General Clerk (GS-05)	AOC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	8	8
Human Resources Specialists (Liaison)																		
(GS-12) - 8 hours for each location	Liaison	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	20	40
TOTALS		16	16	18	22	26	26	46	54	106	194	250	292	384	486	552	652	3140

Important Note:

Because the Government pool of employees that will be part of the MEO, phase-in staffing requires clarification. First, it takes time for Government staff to be transferred to a new organization. This means staff will not be available immediately.

Another key Point is that not all staff will start during the phase-in. The First Performance period is when a full contingent of staff is required. The chart above reflects this dynamic found in all MEO phase-in periods.

APPENDIX I-2
PHASE-IN HOURS AND ACTIVITIES
SPECIFIC PHASE-IN ACTIVITIES

Phase-In Plan Reference	Task	Position Title	Grade
Table 7	Initiate discussion on the development of a joint MEO senior management and CGO phase-in team	Project Manager	14
Table 7	Finalize, at the direction and discretion of the CGO, a joint phase-in team and appoint Phase-In Team Leader.	Project Manager	14
Table 7	Plan, coordinate, and conduct phase-in team meetings.	Project Manager	14
		Deputy Project Manager	13
Table 7	Prepare and distribute agenda and memorandum for record of meetings to each member via email.	Project Manager	14
		Team Leads	9/11
		Deputy Project Managers	13
Table 7	Ensure tasks assigned to team members/activities are completed in a timely manner as not to delay the phase-in schedule.	Project Manager	14
		Deputy Project Managers	13
Table 7	Plan, coordinate, and conduct status meetings at least every 30 calendar days. All MEO staff participate in these status and progress meetings.	Project Manager	14
		Deputy Project Managers	13
Table 7	Prepare agenda and briefing charts.	Project Manager	14
Table 7	Collect "lessons learned" as phase-in progresses.	Project Manager	14
		Deputy Project Managers	13
Table 7	Coordinate and collect detailed input into the Phase-in Plan from Team members.	Project Manager	14
Table 7	Update plan and milestone progress, keeping all team members informed.	Project Manager	14
Table 7	Provide information and documents to DOE MEO team to ensure that the MEO is able to function effectively at the commencement of the first performance period	Project Manager	14
		Deputy Project Managers	13
		Corporate Training Officer	13
Table 7	Post open positions, if required (Assisting human resources staff with responsibility)	Deputy Project Managers	13
Table 7	Interview candidates, if required	Project Manager	14
		Deputy Project Managers	13
		Team Leads	9/11

APPENDIX I-2
PHASE-IN HOURS AND ACTIVITIES
SPECIFIC PHASE-IN ACTIVITIES

Phase-In Plan Reference	Task	Position Title	Grade
Table 7	Hire personnel as necessary (Assisting human resources staff with responsibility)	Project Manager	14
		Deputy Project Managers	13
		Team Leads	9/11
Table 7	Train personnel as necessary		
Table 7	Coordinate with security and other location-specific activities as necessary	Project Manager	14
		Deputy Project Managers	13
Table 7	Begin movement and occupation of space by MEO.	Project Manager	14
		Deputy Project Managers	13
		Human Resources Specialists	12
		Administrative Assistant	7
Table 7	Review requirements for performance as specified in the Letter of Obligation	Project Manager	14
Table 7	Transition work from the current organization to the MEO.	Project Manager	14
		Deputy Project Managers	13
		Corporate Training Officer	13
		Human Resources Specialists	12
Table 7	Perform MEO and CGO joint inventory of property.	Deputy Project Managers	13
		Administrative Assistant	7
		Human Resources Specialists	12
Table 7	Coordinate with the HRA the establishment of MEO in the DOE personnel system.	Deputy Project Managers	13
Table 7	Coordinate systems issues related to MEO staff.	Project Manager	14
		Human Resources Specialists	12
		Deputy Project Managers	13
Table 7	Develop/refine operating practices and procedures	Project Manager	14
		Human Resources Specialists	12
		Deputy Project Managers	13

DOE – Training Support Services

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APPENDIX I-3

PHASE-IN HOURS AND ACTIVITIES – PHASE-IN TRAINING

Note: all training hours are costed in the phase-in period in the appropriate labor categories

Training	Training Duration (days)	Total # of Personnel	Total training hours	Training Location	Training Timeframe	Type of Positions Trained
"Train-the-Trainer" Training						
Communications ¹	1	2	16	DC/AL	November - January	Team Leads (GS-9/11)
	1	2	16			Deputy Project Managers (GS-13)
Customer Service ¹	1	2	16	DC/AL	November - January	Team Leads (GS-9/11)
	1	2	16			Deputy Project Managers (GS-13)
CHRIS/DOE Info ^{2,4}	3	2	48	DC/AL	December - January	Team Leads (GS-9/11)
	3	2	48			Corporate Training Specialists (GS-12)
	3	2	48			Human Resources Specialist (GS-11)
Train-the Trainer Total Hours			208			
Specific Content Training						
Communications ¹	1	10	32	DC/AL	December - January	Human Resources Assistants (GS-07)
	1	2	16			Team Leads (GS-9/11)
	1	2	16			Human Resources Specialist (GS-11)
Customer Service ¹	2	10	160	DC/AL	December - January	Human Resources Assistants (GS-07)
	2	2	32			Team Leads (GS-9/11)
	2	2	32			Human Resources Specialist (GS-11)
CHRIS/DOE Info ²	2	10	160	DC/AL	November - January	Human Resources Assistants (GS-07)
	2	2	32			Team Leads (GS-9/11)
	2	2	32			Deputy Project Managers (GS-13)
	2	2	32			Human Resources Specialist (GS-12)
	2	2	32			Human Resources Specialist (GS-11)
Procedures and Practices	1	10	80	DC/AL	December - January	Human Resources Assistants (GS-07)
	1	2	16			Team Leads (GS-9/11)
	1	2	16			Human Resources Specialist (GS-12)
	1	2	16			Human Resources Specialist (GS-11)
Orientation ³	2	8	128	DC/AL	December - January	Human Resources Assistants (GS-07)
	2	2	32			Team Leads (GS-9/11)
	2	2	32			Human Resources Specialist (GS-12)
	2	2	32			Human Resources Specialist (GS-11)
Specific Content Hours Totals			928			
TOTAL TRAIN-THE-TRAINER AND CONTENT HOURS			1136			

(1) Provided to the on-board Human Resource Assistants and Team Leads

(2) Provided to all staff on-board to some extent. The existing staff will probably include current experienced and skilled CHRIS users, so the extent and direction of this training may differ.

(3) Only applies to new staff, an estimated sub-set of the total staffing on-board before the 1st full performance period.

(4) Because CHRIS is Government Provided Equipment and Services, it is assumed that ME-51 experts will train the MEO as they would be called to train any service provider upon starting at DOE. Some Train-the Trainer will be required to train staff arriving after the initial training.

DOE – Training Support Services

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